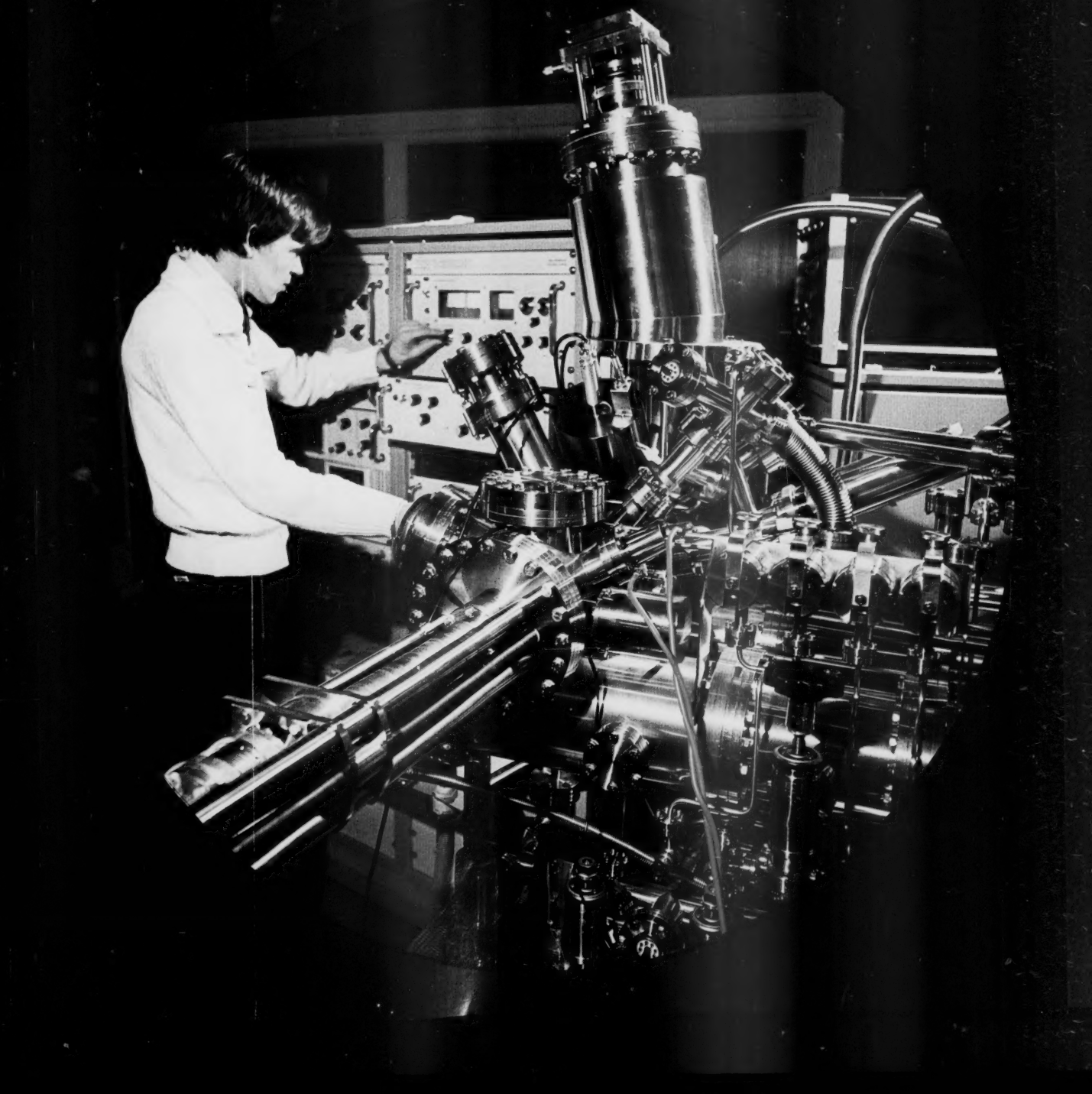
Trade and Industry

12 January 1979 Every Friday 40p

Strategy news: competing with imports

Another electron microprobe for Japan



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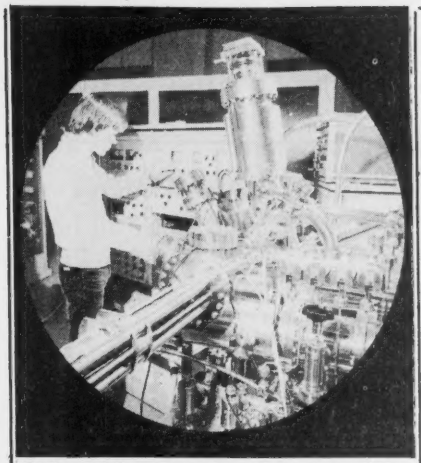
Gingerbread

Trade and Industry

12 January 1979

News from the Departments of Industry·Trade·Prices & Consumer Protection



Sixteen of these scanning auger microprobes have been sold to Japan for applied semiconductor research. In its four-year history, VG Scientific of East Grinstead has sold 150 of these instruments, most of which have been exported.

Trade and Industry

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Strategy News

centre pages

Chairmen and Managing Directors

The following executives are seeking to further their careers within fields where proven experience counts and is rewarded accordingly

FINANCE

1. **Tax Consultant.** An intelligent and industrious finance executive with international experience in tax and investment management in merchant banking and financial services. Seeking greater international involvement.
Age 29 Salary £8,000+

2. **Finance Director.** ACCA. The highly successful F/D of a manufacturing subsidiary of a major industrial group. Promotion and salary blockage: seeking greater responsibility and career development.
Age 30 Salary £10,000+

3. **Group F/D.** Bsc(Chem) FCA. After 3 highly successful years experience in west Africa (T.O. £200m+) involving widespread manufacturing activities, he now seeks a more salubrious base for family reasons.
Age 36 Salary c. £15,000

4. **Financial Manager.** BSc 1st Class MSc, with considerable international experience in trade transactions and retail banking. This has included work on major City investigations. Has particular strength in statistics, mathematics and corporate planning.
Age 35 Salary £8,000+

5. **Management Accountant.** ACA. A very sound technical accountant with international experience in both machine tools and financial services. A successful trainer of 'local' staff. Seeking salary and career development.
Age 38 Salary c. £10,000

6. **F/D and Company Secretary.** FCA with substantial experience in international retail and discount trading – especially in automotive parts, textiles and furniture. Promotion and salary blockage.
Age 35 Salary c. £15,000

7. **Finance Director.** FCA with sound general and marketing experience at the top end of the fashion industry. Excellent appreciation of the installation of computer based systems. Wishes to move to a public company.
Age 43 Salary £12,000+

8. **Finance Director.** ACCA. Fluent Spanish, good French with an unusually wide range of international technical engineering group experience. After successfully reconstructing his present financial management team seeking greater flexibility and increased remuneration with increased responsibility.
Age 39 Salary c. £20,000

9. **Chief Accountant.** FCA, ACMA. A strong technical accountant with substantial manufacturing experience in major groups as well as successful consultancy experience.
Age 46 Salary £8,000+

10. **International F/D.** FCA. Fluent French. Good German with Swiss 'C' Permit. Considerable experience in large manufacturing groups, including acquisitions and divestments. Prepared to travel extensively but to remain Swiss based.
Age 42 Salary SF 75,000+

11. **F/D and Company Secretary.** MA (Oxon) FCA. Fluent French and German with a particularly good understanding of Financial Services and Venture Capital matters and the ability to work in 3 languages.
Age 43 Salary £14,000+

12. **Finance Director.** B.A. Fluent French and German. An outstanding executive with large international manufacturing group experience covering a wide range of products and services. Returning to UK for children's education.
Age 33 Salary c. £18,000

MARKETING

13. **Head Merchandiser.** BA(Hons). An excellent record in wholesale, retail and mail order of men's clothing in the UK and Africa. Seeks to re-establish himself on his return from overseas. A potential Senior Manager.
Age 28 Salary £7,000+

14. **Area Manager.** BA. Fluent French, Spanish and Italian. His impressive Export sales experience covers food, drink and other fastmoving consumer products especially to Latin America and Europe. Seeking a better salary.
Age 28 Salary £8,000+

15. **Marketing Manager.** BA(Hons), good French with large international group experience exporting hardware and household products. (T.O. £200m). Promotion blockage.
Age 31 Salary £9,000+

16. **Export Sales Engineer.** BSc (Mech Eng) 1st Class MIME. Fluent French and German, some Russian. An exceptionally able young man currently re-assessing his career development. His commercial experience covers turbo machinery bearings and pneumatics with the necessary financial back up. Location entirely flexible.
Age 29 Salary £10,000

17. **Export Sales/Planning.** BSc (Minerals Eng) 1st Class. MSc. A strategic planning expert covering mining equipment, biscuit production construction and process engineering products and consultancy. Prime interest remuneration, location as necessary.
Age 29 Salary £12,000+

18. **Computer Salesman.** BSc. MSc. A very successful salesman of both hardware software and service support with a good knowledge of technical development management and backup. A special talent for selling intangeables. Promotion blockage.
Age 34 Salary £12,50C

19. **Business Development Manager.** BA (Econ) MBA. Fluent German. Has strong experience in handling a Sales Force in Pharmaceutical and Food industries. Promotion blockage.
Age 31 Salary £10,000+

20. **Personnel Manager.** BA Oxon. An experienced manager for highly specialised personnel. An excellent knowledge of industrial relations laws. Has achieved first class results in a most demanding situation.
Age 35 Salary £10,000

21. **Export Sales Director.** MA (Oxon) Hons. Fluent French and German, some Danish, Spanish, Italian. A successful team leader of a high quality luxury goods sales force. Promotion and salary blockage.
Age 32 Salary £10,000

22. **Marketing Manager.** BA MBA. Good French, Spanish and Japanese. With 5 successful years with major international trading company in Far East. Seeking a fresh opportunity.
Age 33 Salary £12,000

23. **Marketing Director.** MA (Cantab) MBA+ Fluent French and German. Highly intelligent with an excellent knowledge of Financial Services, commodities and metals. Seeking fresh opportunity.
Age 34 Salary £15,000

24. **Sales/Services Manager.** CEI. An impressive and youthful Chartered Technical Engineer with the full range of a major automotive group main dealer including warranty and work shop management in the UK and overseas.
Age 50 Salary £20,000

GENERAL MANAGEMENT

25. **Industrial Medical Administrator.** With substantial experience of equiping laboratories, nursing homes, health clinics and hospitals with both capital equipment and consumer goods. A detailed knowledge of medical terminology and hospital requirements.
Age 26 Salary £7,000+

26. **General Manager.** BSc Metallurgy. C. Eng. good French. An impressive G/M with 4 years African experience and a good practical knowledge of heavy road haulage and distribution planning. A natural salesman and an executive of definite potential.
Salary 27 Salary c £8,000

27. **General Manager.** BSc Chem. Eng. A first class executive with strong high volume production experience. Currently a consultant who wishes to return to line management with P & L responsibility. A good salesman and highly numerate.
Age 31 Salary c £14,000

28. **Managing Director.** AIB. A successful property company M/D with a substantial major stock bank background. An excellent practical knowledge of Export and Financial Services.
Age 37 Salary c £15,000

29. **Supermarket Director.** His highly successful record covers multiple retail and supermarket operations (T.O. £130M) including 'Start-ups'. Seeking greater flexibility and remuneration either in UK or overseas.
Age 34 Salary c £15,000

30. **General Manager.** BSc MBA. Good French and German. A mechanical engineer whose wide range of international experience covers large transport group Service Engineering management, factory management and consultancy.
Age 36 Salary c £20,000

31. **Purchasing Director and G/M** with major hypermarket group experience in hard goods, cash and carry, white and brown goods. Carried out successful start up operations.
Age 45 Salary c £15,000

32. **Managing Director.** FCA. A strongly financial oriented M/D with a good knowledge of Retail, Cash and Carry and distribution, as well as printing and packaging.
Age 43 Salary £12,000+

33. **General Manager.** Fluent Danish, Swedish, German, Fench. Has considerable fabrication and engineering manufacturing experience especially in aluminium, and construction equipment. Strong export sales and marketing experience. An Olympic Sportsman.
Age 43 Salary c £15,000

34. **General Manager.** PPE (Oxon) 1st class good French and Malay some Spanish. An impressive international record in printing, inks and high volume can production especially in the Far East and Caribbean. A high quality expatriate.
Age 46 Salary c £15,000

35. **Deputy Chairman and M/D.** Considerable management experience in technical engineering, lighting and foundry production. An energetic company doctor who seeks his ultimate move.
Age 44 Salary £15,000+

36. **G/M – Chief Chemist.** C. Chem. MRIC. His impressive major international group experience covers a wide range of plastics production, including sheet, printing, colours and inks. Also all forms of sophisticated packaging machinery.
Age 55 Salary c £15,000

NOTES
(i) All the above executives have been interviewed by us and we consider them to be high quality material in their particular range – there are several others whom space precludes.

(ii) If you require an executive of similar capability please contact me.

(iii) If you yourself feel that you match these standards and might benefit from a new opportunity please contact us in the strictest confidence. There is absolutely no hidden obligation or registration fee: we feel that we have a mutual interest with you in discussing your future.

I A L Robin R. Wheatley

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Home news

Monopolies commission clears wholesale petrol supply

No monopoly conditions operating against the public interest were found by the Monopolies and Mergers Commission in an investigation of aspects of the wholesale supply of petrol in the UK.

Publication of the commission's report, announced on 5 January by Minister of State for Prices and Consumer Protection John Fraser, is the outcome of a reference made by the Director General of Fair Trading on 2 February 1976. It followed an earlier investigation of petrol wholesaling by the monopolies commission, the report on which was published in July 1965.

The commission considered three practices by the wholesalers of petrol. These were: discrimination between retailers on petrol supply prices or terms; promotion of schemes through selling or giving other goods or trading stamps opportunities to enter competitions; and securement of exclusive retail outlets by acquiring proprietary interests in petrol filling stations under certain conditions.

The commission concluded that selective support as practised since 1975 did not operate and might not be expected to operate against the public interest, but suggested that wholesalers should leave no room for doubt in the formulation and administration of selective support schemes that their declared intentions of making no distinctions between independent and company-owned outlets were in fact carried out. The commission concluded that there was no restriction or distortion of competition arising from promotional schemes and that the practice had declined considerably.

With regard to acquisition of exclusive retail outlets by wholesalers the commission concluded that because the operator of a company-owned outlet could not transfer the business of the outlet to another wholesaler, company ownership restricted competition between wholesalers and that this constituted a complex monopoly situation. It concluded that, at its 1977 level, company ownership of retail outlets did not operate against the public interest and might not be expected to do so.

However, the commission did foresee possible dangers if company-owned outlets were to provide a very high proportion of retail sales in any major local market; entry of new wholesalers might be deterred and price competition reduced. It suggested that the situation be kept under review by the Director General of Fair Trading, so that if a significant increase of company ownership were found to be taking place or if adverse effects on competition occurred, the director general would be able to make a further reference to the commission.

Mr Fraser said that in the absence of any findings of adverse effect on the public interest there were no grounds for action by the secretary of state.

In noting the commission's conclusion that the practice of selective price support did not operate against the public interest Mr Fraser said that this emphasised the need for wholesalers to operate selective support schemes fairly and to be seen to be doing so. He was aware that many oil companies had either withdrawn or greatly reduced the scale of selective support schemes since the commission had completed its investigation. However, it was possible that selective price support might spread again in the future, and he therefore nonetheless welcomed the commission's suggestion that wholesalers should leave no doubt in the formulation and administration of such schemes that they were not making any distinctions between independent and company-owned outlets. This might go some way to remove the sense of grievance often felt by petrol retailers who did not receive selective support. He looked to wholesalers still operating selective schemes to act on the commission's suggestion as a matter of priority.

The minister of state said that the commission's suggestion that the Director General of Fair Trading should keep levels of company ownership and seller concentration under review was primarily a matter for the director general. He understood that the director general intended to discuss this suggestion with the oil companies.

Disappointment expressed

Disappointment was expressed by Gordon Borrie, Director General of Fair Trading, on the commission's report. Mr Borrie said that he was disappointed that the commission had interpreted its terms of reference as not enabling it to investigate a number of licensing and leasing matters of particular concern to the Motor Agents' Association.

Mr Borrie went on to say that his office had expected at the time of the reference that the commission would feel able to investigate a wide range of licensing and leasing matters and the commission was aware of that expectation. But until he had seen the report he did not know that the commission would be taking the view now expressed that various submissions made on these matters by the MAA could not be taken into account in its investigations.

Petrol price regulations amended

Minor amendments to the Petrol Prices (Display) Order 1978 come into operation on 1 February.

The order substitutes a reference to the new British standard specification for petrol for the existing reference in the 1978 order. In addition, the order provides that paragraph 7 of the schedule to the 1978 order applies only where the lowest price of a grade of petrol is higher than the lowest price of a higher grade of petrol; and the minimum height requirements specified for certain lettering in price displays apply only to roadside price displays.

The Petrol Prices (Display) (Amendment) Order 1979, SI 1979/4, was laid before parliament by Robert Maclennan, Parliamentary Under-Secretary of State for Prices and Consumer Protection, on 5 January.

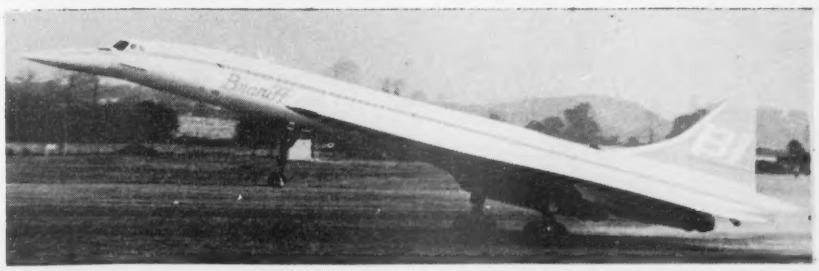
Concorde set for service within US

Concorde received its United States type certification of airworthiness from the Federal Aviation Administration on Tuesday (9 January). This opens the way for the operation of Concorde between Washington and Dallas, Texas, by Braniff International, the first United States airline to operate the aircraft.

The airworthiness certificate was presented at two ceremonies – to British Aerospace at Heathrow and to Aerospatial in Paris – after many months of investigation by the FAA. Only a small number of minor modifications had to be made to Concorde to ensure that it fully met the United States' requirements.

Braniff is scheduled to begin the Dallas/Washington service on 12 January. This service will interchange at Washington with British Airways and Air France supersonic flights to Europe. Providing the only daytime crossing from Dallas to Europe, the total journey time from Texas to London or Paris, including the stop at Washington, will be around seven hours

Concorde takes the bright orange markings of Braniff International for service in the United States.



Price Commission investigates Perkins Engines

Price increases proposed by the Perkins Engines Company, a subsidiary of Massey-Ferguson Holdings Ltd, are to be investigated by the Price Commission. The company wants to increase by an overall weighted average of 10.63 per cent the prices of its range of diesel and petrol engines, reconditioned engines, 'short' engines and parts and optional extras.

The commission has notified the Secretary of State for Prices and Consumer Protection that it intends to investigate the increases.

In the particular circumstances and pending a full examination of the company's entitlement under the safeguard regulations, the commission has decided to exercise its discretion to allow interim increases equivalent to a weighted average of 5 per cent over the range of products.

In arriving at this decision, the commission says that it recognised the importance for the company, given the nature of its business, of being able to implement an increase on 5 January.

The investigation is due to be completed by 4 April. Anyone who wishes to make representations to the Price Commission about the investigation should write to the Secretary, Price Commission, Market Towers, 1 Nine Elms Lane, London SW8.

. . . and Rugby Portland Cement

Price increases proposed by the Rugby Portland Cement Co Ltd are also to be investigated by the Price Commission. The company wants to increase the prices of its cements by an overall weighted average of 10.9 per cent.

Individual increases on the various types of cement would be 11 per cent on ordinary portland and rapid hardening cements, both of which are subject to the cement manufacturers' common price agreement; 11 per cent on Crown masonry cement, and 9.6 per cent on Crown sulphate-resisting cement.

The commission has notified the Secretary of State for Prices and Consumer Protection that it intends to investigate the increases under section 4 of the Price Commission Act 1977. The investigation is due to be completed by 10 April.

PSA/Chrysler agreement confirmed

The government's agreement with PSA Peugeot Citreon (PSA) governing the transfer of ownership of Chrysler United Kingdom from Chrysler Corporation to PSA came into full effect on 21 December when the merger between PSA and Chrysler's principal European subsidiaries was approved by the shareholders of PSA.

Formal documents have now been signed implementing the heads of agreement announced by Secretary of State for Industry Eric Varley on 28 September (see *Trade and Industry*, 6 October 1978). The principal documents are:

☐ The PSA agreement – under which PSA assumes all the liabilities and rights of Chrysler Corporation (CC) in respect of loans, loss subventions and guarantees under the agreement of 5 January 1976 to provide financial assistance to Chrysler United Kingdom (CUK).

☐ The PSA indemnity – under which PSA provides an indemnity against any liability falling on the Secretary of State for Industry in respect of his guarantee of the £35 million loan made by the clearing banks to CUK in January 1976.

☐ The PSA guarantee – under which PSA provides a guarantee of repayment of the £28 million government loan to CUK for capital expenditure provided for in the 1976 agreement.

☐ The deed of release – which releases Chrysler Corporation from all the obligations assumed by PSA under the PSA agreement except that for the period to November 1980, while the ex-Chrysler operations are managed by Groupement d'Interet Economique jointly controlled by PSA and CC, CC will remain jointly liable with PSA for the indemnity and guarantee referred to above: these transitional obligations of CC are set out in two further documents, the Chrysler indemnity and the Chrysler guarantee.

The conditions under which the support is provided or could be withdrawn remain unchanged from those which were set out in the January 1976 agreement.

Of the loans for capital expenditure by CUK provided for in the 1976 agreement, the whole of the £28 million guaranteed loan has already been advanced, and £17 million of the £27 million secured loan remains to be advanced by 31 December 1979. Under the loss subvention arrangements, the government remains committed to reimburse 50 per cent of CUK's losses in 1978 and 1979, subject to a maximum subvention of £7.5 million in 1978 and £5 million in 1979. (A subvention of £41.5 million was paid in 1976 and one of £10 million in 1977.)

Merger proposals cleared

Secretary of State for Prices and Consumer Protection Roy Hattersley had decided, on the information at present before him, not to refer these proposed mergers to the Monopolies and Mergers Commission under the Fair Trading Act 1973:

Tunnel Holdings Ltd/the chemical division of Barrow Hepburn Group Ltd.

Sedgwick Forbes Ltd/Bland Payne Holdings Ltd.

Dawson International Ltd/John Haggas Ltd.

Mr Hattersley has also decided, on information at present before him, not to refer the proposed acquisition by Electronic Rentals Group Ltd of British Relay Wireless and Television Ltd, or the acquisition by the UBM Group Ltd of certain motor dealer subsidiaries of the Hodge Group Ltd, to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973.

Earl's Court-on-Sea!

The annual *Daily Express* international boat show opened in London on 4 January. Among the exhibitors the Coastguard has as its theme 'HM Coastguard in the eighties' reflecting the current re-organisation of the service to meet present and future needs. The stand is manned by coastguards with Angus McLeod as 'Station Officer, Earl's Court'.

'T & I' index inquiries

Readers wanting to know when articles and items of information were published in *Trade and Industry* should consult the published indexes which are issued free to subscribers. For material published in recent months, inquiries of this kind can be made to the Department of Industry Library's indexing section, tel. 01-215 5842 or 01-215 5879.

Government sales

24 January 1979 – Miscellaneous

Location
Hilltop Motor Hotel, London Road, Carlisle

Auctioneers
Harrison and Hetherington (Dept L), Borderway Mart, Rosehill, Carlisle (0228 26292)

Stores lying at Carlisle and elsewhere including clothing, webbing, photographic items, rack assemblies, aircraft wheels, aircraft and MT tyres, steel tubing, bars and sheets, furniture, machine and hand tools, instruments, periscopic sextants, clocks, watches, Bedford trucks, Austin chassis cabs, Scammell trailers, fork-lift trucks, Austin and Ford saloons and other items.

30 and 31 January – Miscellaneous

Location
Garrison Theatre, Graven Hill, Bicester, Oxon

Auctioneers
Midland Marts Ltd (Dept L), 4 Market Square, Bicester, Oxon (08692 2073)

Stores lying at Bicester, Thatham and elsewhere including clothing and textiles, furniture, tentage and tarpaulins, tyres, MT spares, hand tools, watches, electrical equipment, tape recorders, estate cars, saloon car, mini-buses. vans, pick-up truck, petrol tanker, tractor, forklift trucks and a large quantity of miscellaneous items.

Catalogues, which give details of the lots, conditions of sale, viewing times, etc, are available from the auctioneers from two weeks before and up to the day of the sale, price 40p, postage 15p.

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Harlau, one of Safetyships' vessels used for offshore stand-by duty, is currently on charter to British Petroleum for its North Sea Forties field. Regulations state that within five miles of every manned offshore installation there must be a vessel present and ready to give assistance should any emergency occur.

New standards for stand-by vessels

New safety standards affecting stand-by vessels for offshore installations came into effect on 1 January. The Department of Trade has issued 'Instructions for the guidance of surveyors' which set down minimum performance and equipment requirements for such vessels and replace previous standards agreed in 1977.

Observation of the standards is not obligatory but the United Kingdom Offshore Operators Association and the Department of Energy have agreed that only stand-by vessels able to produce a valid certificate of survey will be employed. The Department of Trade has issued the new instructions to its marine surveyors after consultation with other government departments, the offshore industry and the stand-by vessel operators.

The instructions set out the standards that Department of Trade surveyors will expect to be met in respect of each vessel capable of accommodating up to 250 survivors. Guidance is also given for vessels designed to accommodate over this number but vessels of this size will be considered on their own merits.

The major function of stand-by vessels is to save the lives of those on oil rigs and similar offshore installations by assisting in the evacuation of people in the event of an emergency; accommodating all installation personnel on a short-term basis in the event of a total evacuation; providing first aid to rescued people; acting as a reserve radio station able to communicate with the installation, other vessels and nearby installations and coast stations; rescuing people from the water near an installation; and being available to rescue people during helicopter take-offs and landings, overside work, and diving work.

Copies of the instructions, price £1.30, are available from: Offshore Safety Section, Marine Division, Department of Trade, Room 723, Chancery House, Chancery Lane, London WC2A 1QU.

New facilities at Heathrow

Additional passenger facilities are to be provided at Heathrow Airport's terminal 3 when work begins shortly on the construction of three new gaterooms on pier 6 to serve wide-bodied aircraft. New moving walkways are to be installed to improve access between the gaterooms and the terminal.

The contract, worth more than £3 million, has been awarded to John Laing Construction Ltd.

The gaterooms, each measuring 410 m², will enhance the facilities for long-distance passengers using aircraft on three adjoining parking stands and the work includes provision of a new telescopic apron-drive jetty for each gateroom and refurbishment of the existing loading bridges.

Nearly 2.8 million passengers passed through the seven airports operated by the British Airports Authority in November – an increase of nearly 16 per cent on the same month last year.

Over the last 12 months, Heathrow and Gatwick both recorded increases of around 15 per cent (16 and 43 per cent respectively over the two-year period), while Stansted, after several disappointing months, recorded an improvement of 10 per cent. In Scotland, as expected, Edinburgh and Glasgow both recovered fast from the depressed levels of last November, caused by the withdrawal of shuttle services, to show increases of 25 and 40 per cent respectively.

Chemical company moves in at Newquay

Spectra Automotive and Engineering Products Ltd, is occupying an advance factory of 900 m² (10 000 sq ft), with approval for an extension of 2400 m² (26 000 sq ft), built by the English Industrial Estates Corporation on the Department of Industry's site at Treloggan industrial estate, Newquay, Cornwall.

Spectra Automotive, of Haywards Heath, West Sussex, manufactures automotive and industrial chemicals, spray paints, sealing compounds, pastes and other maintenance saving devices.

The company anticipates employing 120 people by the end of 1983. Its immediate employment requirements, before the completion of the extension, will be 50, building up over the intervening years.

Managing director P. N. Whitehead commented: 'The demands for our products are such that a factory situation as offered in Newquay is absolutely essential for us to cope with rapidly increasing product requirements, much of which demand comes from the overseas markets'.

Three more terrace units on Department of Industry industrial sites have been occupied:
Gateshead. Tyne Kitchens Ltd has occupied terrace unit premises of 280 m² (3000 sq ft) built by the English Industrial Estates Corporation on the Team Valley estate at Gateshead. Tyne Kitchens is a new company intending to manufacture melamine laminate kitchen units primarily for the disabled and elderly.
Batley. Meritmill Ltd has occupied terrace unit premises of 225 m² (2500 sq ft) built by the English Industrial Estates Corporation on the department's site in Bradford Road, Batley. The company makes cards and pattern books for the textiles industry.
South Shields. Davra Textiles Ltd is to occupy terrace unit premises of 250 m² (2700 sq ft) built by the English Industrial Estates Corporation on the department's Middlefields industrial estate, South Shields. The company will manufacture clothing, mainly ladies' fashion dresses. With an excellent order book, the company expects to employ a further 40 people as soon as possible.

Foundry scheme committee re-appointed

Members of the advisory committee for the government's non-ferrous foundry industry scheme have been re-appointed by industry secretary Eric Varley.

John W. Ray, chief executive of Chloride Group, is to continue as chairman, and committee members re-appointed are R. Garland, general secretary, Foundry Section Amalgamated Union of Engineering Workers; A. J. Jennings, Birmingham and western Midlands regional officer, General and Municipal Workers Union; L. C. W. Turner, deputy chairman and executive director, Thomas Bolton and Sons Ltd; J. M. Wainwright, managing director, Davy Loewy Ltd; and B. W. Waters, partner, Arthur Young McClelland Moores and Co, chartered accountants.

The committee was set up in March 1977 to advise the Department of Industry on the scheme, which offered financial assistance under section 8 of the Industry Act 1972, to encourage modernisation and development of the non-ferrous foundry industry.

The scheme closed for applications in July last year by which time over 300 applications had been received for assistance totalling £26

million towards projects with estimated capital costs of £120 million.

The government is satisfied with the response to the scheme and has so far offered over £14 million to 156 applicants. The remaining applications should be cleared in the next few months.

Drop-forging scheme extended

Assistance under the drop-forging scheme, within the £5 million originally announced, will be available to firms applying during the first six months of this year, the Department of Industry announced on 4 January. The scheme, which had been due to close on 31 December 1978, has been extended to 30 June, the new closing date for applications.

Closing date for completion of projects is extended to 31 December 1981. The project cost upper limit of £500,000 is abolished. The minimum project cost threshold of £50,000 is now reduced to £25,000 for projects involving plant, machinery and equipment only, but remains at £50,000 for projects involving buildings only or those involving plant, machinery, equipment and buildings.

Inquiries about the scheme should be made in writing to the department's regional offices.

Pricing of government non-competitive contracts revised

Agreement has been reached between the government and the Confederation of British Industry on a revision of the profit formula for non-competitive government contracts from 1 October 1977. The agreement has been made known to contractors through the CBI and trade associations.

Copies of the revised formula, addendum 4 to form G6/stores/2, are obtainable from the Ministry of Defence, OS(F), MOD Form Depot, Strathville Road, Wandsworth, London SW18 4QU.

Current cost accounting:

Price indices for overseas countries

In 1977 the Central Statistical Office and the Inflation Accounting Steering Group jointly commissioned a study of the availability of price indices for current cost accounting in fourteen countries. The results of this study are available in a booklet, 'Current Cost Accounting: Guide to price indices for Overseas Countries', obtainable from Her Majesty's Stationery Office.

The booklet contains descriptions of the most appropriate indices, together with comments on their usefulness, for current cost accounting. In addition the booklet gives details of overseas price indices available in UN and OECD publications.

Price £1.60 (£1.72 by post). ISBN 0 11 630163 5

New chairman for Hearing Aid Council

Secretary of State for Prices and Consumer Protection Roy Hattersley has appointed Harold Gould as chairman of the Hearing Aid Council to replace Kenneth Addison who has served as chairman for seven years. Mr Gould is a senior partner in chartered accountants Wilson Wright and Company. The appointment is for three years.

Official appointment

West Midlands Gas Consumers' Council. Roy Hattersley, Secretary of State for Prices and Consumer Protection, has appointed Mr S. King as chairman of the West Midlands Gas Consumers' Council until 31 December 1981.

Degree day service: figures for December

Degree day figures for December, published by the Department of Energy, are shown in the table. This service is designed to help industry and commerce improve the efficiency with which space heating systems are used.

The figures are a record of the extent and length of time in a particular month that the external temperature fell below a base figure of 15.5 degrees C (60 degrees F). Because this affects the amount of fuel needed to provide a given level of space heating the figures can be used to check on the efficiency of heating systems. By comparing the amount of fuel used with the number of degree days in monthly periods of different years, energy managers and others can monitor the performance of heating plant and operate it more economically.

Free booklet

Detailed information about the system is contained in a free booklet *Degree Days* (no. 7 in the fuel efficiency series) available from the Library, Department of Energy, Thames House South, Millbank, London SW1P 4QJ, tel. 01-211 3394. It explains the theory and practice of using the figures and contains a map showing the locations of the 17 Meteorological Office stations and the regions covered.

December degree days (base temperature 15.5 degrees C)

Region	Calculated average for Dec 1957-77	1977 Dec	1978 Dec
Thames Valley	333	274	316
South East	356	292	334
Southern	327	264	297
South West	276	230	248
Severn Valley	329	276	323
Midland	359	301	367
West Pennines	347	292	356
North West	360	311	372
Borders	361	301	364
North East	361	309	397
East Pennines	351	313	387
East Anglia	361	288	346
West Scotland	358	320	380
East Scotland	370	319	369
North East Scotland	382	324	371
Wales	303	269	306
Northern Ireland	345	297	343

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Investing in Britain

This week's review of investment in the UK by British and overseas firms features a company from the United States, and, on the home front, investment by British companies in the north, midlands and Dorset.

Reorganisation for Poole firm

Fairmile Engineering Ltd, the exporting arm of Bourne Steel Ltd, Dorset-based structural steel engineers, has been reorganised as a completely independent company directly responsible to Forelle Ltd, the parent holding company.

The move is also in line with the general expansion of the Forelle Group, which, in addition to Fairmile and Bourne Steel, includes Copegrove Properties Ltd, Poole property developers, and owners and a Scottish property company, Greenhead Properties Ltd of Glasgow.

In future Fairmile Engineering will be based at Strand House in Poole and will have its own design, marketing and sales and administrative staff. The company will continue to concentrate on the design, marketing and supervision of fabrication and erection of steel structures and cladding for industrial and commercial buildings in overseas markets. It has introduced a range of standard buildings as an extension to its custom-designed structures.

In the two years since it was formed Fairmile has received export orders totalling £6 million – almost all from Middle East countries.

An expansion programme is also under way at Bourne Steel's premises in Parkstone, Poole. A new £100,000 factory is now nearing completion to house painting and packing departments and the company has also acquired the adjoining premises of Homestead Engineering Ltd for future extensions.

ECL continues expansion in Deeside

Engineering Concessionaires Ltd (ECL), Deeside-based manufacturers and distributors of plumbers fittings, has moved to a new, purpose-built factory complex, next to its old premises at Chester Road, Sandycroft.

The company is one of Britain's largest distributors of water fittings: the current value of stocks is over £1 million. With the completion of the new 300 000 sq ft premises, stockholding capacity will be increased by up to 50 per cent.

Managing director Derek Wilson explained that the move would enable the company to consolidate its reputation for prompt service to customers. He pointed out that at ECL almost every order, irrespective of its size, was processed and despatched the same day that it was received.

Engineering Concessionaires was founded in 1961 in Birmingham by chairman, Ray Crick. Four years ago the company moved its distribution and assembly operations to Deeside, which subsequently became the group's headquarters.

New factory for BL truck and bus division

Work has started on the new £1.4 million spare parts factory being built by Hayward Industrial Developments for Leyland Vehicles at Chorley in Lancashire. It forms part of a major programme to modernise production facilities of the truck and bus division.

The purpose-built factory, covering 120 000 sq ft, will stand on a 7.5 acre site at Common Bank industrial estate within two miles of the main Leyland complex. The factory is due to be completed in April, when it will be fitted out with the latest machinery for the production of spare parts for Leyland vehicles. London and Manchester Assurance has contracted to purchase the building when completed and it will then lease it back to Leyland Vehicles.

The whole contract ends in July with the completion of the external standing area. At this point the factory will be handed over to London and Manchester Assurance.

Jaeger concentrates Kilmarnock production

Jaeger Tailoring Ltd, which has been in Kilmarnock for 10 years, is to take a site on the industrial estate which is being developed by Kilmarnock and Loundoun District Council at Bonnyton, Kilmarnock.

Jaeger intends to build a £600,000 factory with an area of 32 000 sq ft at Bonnyton and to transfer production from the three units presently operating at Lawson Street, Bentinck Street and Western Road. The workforce will eventually be increased from 180 to 260, giving employment to another 65 women and 15 men.

Bonnyton will be the biggest skirt-manufacturing unit in the group with the capacity to produce 7000 skirts and slacks each week.

Fisher Price chooses manufacturing base

A quarter of a million toys left Fisher Price's new factory at Peterlee in Co Durham by the end of 1978. The 57 000 sq ft advance factory began production last June.

Fisher-Price is a subsidiary of the Quaker Oats Co of the United States. Managing director James Arnold-Baker says that the reasons for starting manufacturing in the UK were low costs and the size of the market. One-third of Fisher-Price's sales are outside

the United States. Europe is the company's fastest-growing market and the UK is the biggest portion of that market.

Peterlee is in one of the government's areas for expansion where there are special incentives to encourage the location of industry. Fisher-Price's new factory employs 60 men and women and there are plans to employ more. The development grants were very important in helping the company start operations, Mr Arnold-Baker says, and 'we have a site with plenty of room for future expansion'. Turnover is now £12 million and over half the UK production is exported.

Invest in Britain Bureau moves to new HQ

The Invest in Britain Bureau of the Department of Industry recently moved from its previous headquarters at Millbank Tower to Kingsgate House. The address of the bureau is now: Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ, tel. 01-212 7676, telex 8813148 DIHQ G.

The move followed an increase in the staff and a re-organisation of the bureau since activity considerably increased on the inward investment front. The bureau now consist of two branches; one under Cyril Silver which is responsible for policy and information and Japan; and the other under Sandy Gordon-Cunning which is responsible for policy, promotional work and negotiations in relation to direct manufacturing investment in the UK from USA, Europe and the rest of the world.

Cyril Silver 01-212 0998
Section A: policy including selectivity, interaction with regional policy, etc
Susan Seymour 01-212 5873
Section B: general briefing, information (booklets, publicity material) etc
Colin Sansum 01-212 6146
Section C: Japan and certain other countries in Asia
Brian Lodge 01-212 0994
Graham Fry (from February)

Sandy Gordon-Cumming 01-212 3467
Section A: USA and all non-European companies (other than those covered by Section C above)
Brian Lodge 01-212 0994
Keith Newton 01-212 8629
(USA other than eastern states and rest of world)
Ivor Simpson 01-212 3767
(eastern USA and Canada)
Section B: European companies
John Loder 01-212 5798
Mike Gooch 01-212 6074

News for inclusion in 'Investing in Britain' should be addressed to: The Editor (Investing in Britain), Trade and Industry, Eighth Floor, 1 Victoria Street, London SW1H 0ET.
Advertisers who wish to be associated with the feature should contact Terry Day on 01-242 9478 (or, in the north, Alan Loftus on 061-766 2191).

New publications

Departmental publications not sold through HMSO

This list includes material issued by the Departments of Industry, Trade, Prices and Consumer Protection, and Energy, the Monopolies and Mergers Commission, the Office of Fair Trading, and the Price commission, which was notified to the compiler during December.

Department of Industry

Computers, systems and electronics division

Computers, Systems and Electronics Requirements Board: annual report 1977-78. 1978. 1 folded sheet.
Department of Industry, Computers, Systems and Electronics Requirements Board, Room 203, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG

Computers, Systems and Electronics Requirements Board: finance for R&D. 1978. 1 folded sheet.
Department of Industry, Computers, Systems and Electronics Requirements Board, Room 203, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG

Report of the National Committee on Computer Networks. Presented to the Secretary of State for Industry by J. Howlett; October 1978. 1978. 121 pages. Department of Industry, Computers, Systems and Electronics Division 2, Room 208, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG

EEC Information Unit

EEC: this is your business. 2, Knowing your markets. [Part 2 of a three-part *Trade and Industry* guide to the European communities, published as a supplement with 1 December 1978 issue.] 36 pages.
Available separately from: *Trade and Industry*, Eighth Floor, 1 Victoria Street, London SW1H 0ET (Price 40p per part or £1 for the three supplements.)

EEC: this is your business. 3, Keeping in touch. [Part 3 of a 3 part *Trade and Industry* guide to the European communities, published as a supplement with 8 December 1978 issue]. 44 pages.
Available separately from: *Trade and Industry*, Eighth Floor, 1 Victoria Street, London SW1H 0ET
(Price 40p per part or £1 for the three supplements.)

Electrical engineering, process plant and industrial technologies division

Assistance for research and development activities in industry. November 1978. 16 pages.
Department of Industry, Room 539, Ashdown House, 123 Victoria Street, London SW1E 6RB

Guides to practice in corrosion control,1: Sources of corrosion information. 1978. 8 pages. For UK use only.
Department of Industry, Room 548, Ashdown House, 123 Victoria Street, London SW1E 6RB

Committee for industrial technologies

Industrial technologies advisory centres: corrosion, materials handling, terotechnology, tribology. 1978. 9 pages.
Department of Industry, Committee for Industrial Technologies, Room 520, Ashdown House, 123 Victoria Street, London SW1E 6RB

The industrial technologies campaign 1972-78: a brief guide. November 1978. 9 pages.
Department of Industry, Committee for Industrial Technologies, Room 520, Ashdown House, 123 Victoria Street, London SW1E 6RB

Committee for materials handling

Materials handling: an introduction. (Brief guide to a book of the same name.) 1978. 1 folded sheet.
Department of Industry, Committee for Materials Handling, Room 520, Ashdown House, 123 Victoria Street, London SW1E 6RB

Electronics applications division

The applications of semiconductor technology. The Advisory Council for Applied Research and Development (ACARD): report to the Cabinet Office, September 1978. 1978. 1 folded sheet. Leaflet printed for the Design Engineering Exhibition, December 1978.
Department of Industry, Electronics Applications Division, Room 305, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG

Microelectronics: the new technology. 1978. 24 pages.
Department of Industry, Electronics Applications Division, Room 305, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG

Microprocessor technology and applications: training facilities – an initial guide. November 1978. 1 folded sheet. Leaflet printed for the Design Engineering Show, 4-8 December 1978.
Department of Industry, Electronics Applications Division, Room 312, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG

Industrial technologies' education and training committee

Teaching material in terotechnology, 3: mechanical conveying equipment. 1978. 10 pages.
Department of Industry, Room 329, Ashdown House, 123 Victoria Street, London SW1E 6RB

National Terotechnology Centre

National Terotechnology Centre. (Amended reprint 1978). 1 folded sheet.
National Terotechnology Centre, Cleeve Road, Leatherhead, Surrey KT22 7SA

Regional policy and development grants division

Incentives for industry in the areas for expansion: special development areas, development areas, intermediate areas, Northern Ireland. September 1978. 44 pages.
Department of Industry, Regional Policy and Development Grants Division, Room 636, Millbank Tower, Millbank, London SW1P 4QU.

Regional support and inward investment division

Report of the working party on Kirkby Manufacturing and Engineering Co. Ltd. November 1978. 22 pages.
Department of Industry, Ashdown House Library, 123 Victoria Street, London SW1E 6RB

Research and technology requirements and perspectives division

Engineering Materials Requirements Board: review for 1977-78. 1978. 4 pages.
Department of Industry, Research and Technology Requirements and Perspectives Division, Room 308, Abell House, John Islip Street. London SW1P 4LN

Industrial energy thrift scheme. Report no. 2: energy use in the pottery industry. A report prepared by the British Ceramic Research Association. 1978. 42 pages.
Department of Industry, Ashdown House Library, 12 Victoria Street, London SW1E 6RB

Small firms division

Co-operative information. [1978.] 7 pages.
Department of Industry, Small Firms Division, Room 332, Abell House, John Islip Street, London SW1P 4LN

Technology Reports Centre

R&D abstracts. Vol. 38, no. 10, 15 November 1978.
R&D abstracts. Vol. 38, no. 11, 1 December 1978.
Available on annual subscription of £42 from Department of Industry, Technology Reports Centre, Station Square House, St Mary Cray, Orpington, Kent BR5 3RF; free to government departments and certain other official bodies.

Department of Trade

Accidents investigation branch

AIB bulletin. No. 12/78. 21 December 1978. 10 pages.
Department of Trade, Accidents Investigation Branch, Room 401, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ

Departmental publications listed

Publications '77, a cumulative list of all the publications issued during 1977 by the Departments of Industry, Trade, Prices and Consumer Protection, Energy, the Office of Fair Trading, the Monopolies and Mergers Commission, and the Price Commission, and not otherwise available from HMSO, may be obtained free of charge from the Department of Trade Library, Room LG 30, 1 Victoria Street, London SW1H 0ET.

British Overseas Trade Board

Hints to businessmen series (price £1 + 20p p & p each):
Cuba. 1978-79. 40 pages.
Zambia. 1978-79. 56 pages.
Hints to exporters series (price £1 + 20p p & p each):
Algeria. 1978-79. 50 pages.
Bolivia. 1978-79. 44 pages.
People's Republic of the Congo. 1978-79. 40 pages.
Available from: BOTB, Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU. Available in UK only.

The Japanese market for jewellery, personal accessories and leather goods. November 1978. 279 pages. Price £35.
BOTB, Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU. Available to UK manufacturers only.

Department of Prices and Consumer Protection

Metrology, quality assurance and standards division

A national strategy for quality: a consultative document. 1978. 20 pages.
Department of Prices and Consumer Protection, Metrology, Quality Assurance and Standards Division, Room 2815, Millbank Tower, Millbank, London SW1P 4QU

Departments of Industry, Trade and Prices and Consumer Protection

Common Services

Economics and statistics division

Monthly review of external trade statistics, no. 38, November 1978. [142 pages.] £3.00.
Monthly review of external trade statistics, no. 39, December 1978. [152 pages.] £3.00.
BOTB, Publications Sales Unit, Export House, 50 Ludgate Hill, London EC4M 7HU

Libraries

DPCP, metrology, quality assurance and standards division. Handlist of historical material on legal metrology March 1978. [22 pages.]
Department of Prices and Consumer Protection, Metrology, Quality Assurance and Standards Division, Room 316, 26 Chapter Street, London SW1P 4NS

Publications '77: a list of documents issued by the Departments of Industry, Trade, Prices and Consumer Protection, Energy, the Office of Fair Trading, the Monopolies and Mergers Commission, and the Price Commission and not available from HMSO, compiled by Lynda Cooper and Sylvia Waterson, Library, Bibliographical Services. 1978. 78 pages.
Department of Trade Library, Room LG30, 1 Victoria Street, London SW1H 0ET

Department of Energy

Gas depletion policy as a central theme in a robust energy policy. Report of an exchange study visit to the Ministry of Economic Affairs, The Hague, 17–28 October 1977, by P. D. Atkinson. 1978. [68 pages.]
Department of Energy Library, Room 1020, Thames House South, Millbank, London SW1P 4QJ. Available on microfiche only.

Energy Commission

Papers
21. The pattern of domestic energy consumption and the growth of prices in relation to consumers' income and expenditure 1966–1977. Paper by Sir Francis Tombs, chairman, The Electricity Council. [1978.] 6 pages.
Department of Energy Library, Room 1020, Thames House South, Millbank, London SW1P 4QJ. Single copies only.

Office of Fair Trading

'Dog days' or how the Sale of Goods Act can help with your shopping problems. [Promotional leaflet for a slide-tape kit.] 1978. 1 folded sheet.
Office of Fair Trading, Room 310A, Field House, Breams Buildings, London EC4 1PR

'Dog days' or how the Sale of Goods Act can help with your shopping problems. A slide-tape kit. 1978. Price £9.95. Hire charge £4.32.
Central Film Library, Government Buildings, Bromyard Avenue, London W3 7JB

Electrical goods. ('For your protection' series.) **1978.** [Reprint.] One folded sheet. Office of Fair Trading, Room 310A, Field House, Breams Buildings, London EC4 1PR

How to cope with doorstep salesmen ('For your protection' series.) 1978. (Amended reprint.) 1 folded sheet.
Office of Fair Trading, Room 310A, Field House, Breams Buildings, London EC4 1PR

How to put things right. 1978. (Reprint.) 7 pages.
Office of Fair Trading, Room 310A, Field House, Breams Buildings, London EC4 1PR

Technology news

DoI explores robot potential in industry

Action has been initiated by the Department of Industry in a number of areas relevant to industrial robot technology. Discussions between the department and industrial companies, to assess the possibilities for further government initiatives, are revealing that there is growing activity in this field within British industry.

Industrial robots, as presently applied, are taking automation into many repetitive but exacting industrial tasks. Their applications range over surface coating, die casting and forging, welding, investment casting, machining and assembly. Essentially they are machines that, under the control of a computer, are capable of carrying out a complex programmed sequence of manipulations of, or forming operations on, work pieces – repeatedly and accurately.

The department's concern is to further the development of more sophisticated control of industrial robots, particularly as an application of microelectronics technology, and to promote the wider application of them in industry.

A key factor in determining the extent and pace of developments in the UK is the size and shape of the market for industrial robot technology. As a step towards trying to assess this the department has placed a contract with consultants to explore potential markets. Work has begun and the department expects to receive the consultants' report in the early spring.

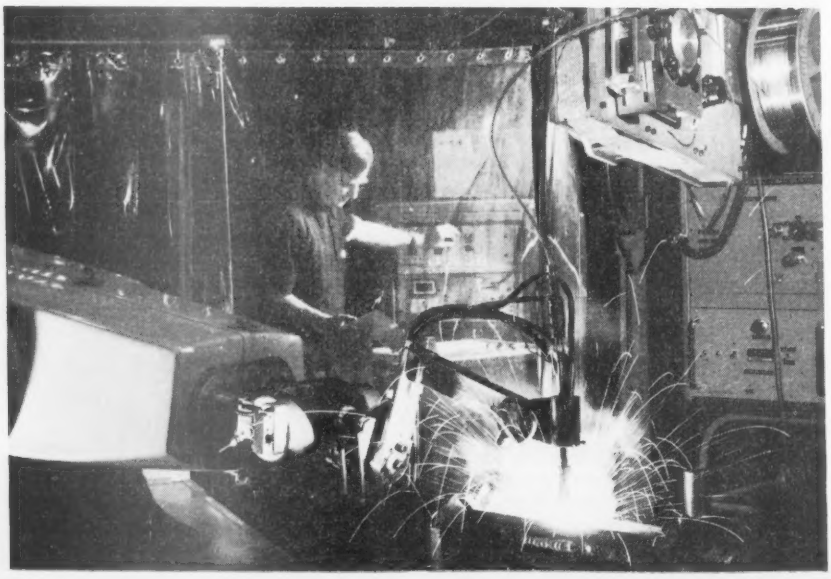
On the technical level the department is extending the work in this area at its National Engineering Laboratory, East Kilbride. The laboratory has been engaged for some time on projects involving the application of robots to welding operations. Under the sponsorship of the department's mechanical engineering and machine tool requirements board a larger team is being built up at the laboratory to concentrate on robot development and applications.

Equipping robots will be one area of interest. Future developments towards automated production cells and eventually automatic factories will involve the extensive use of robots capable of communicating with each other. This will be investigated at NEL particularly with regard to the inter-face standards that will be required to lessen the cost of development of the automation of small batch manufacture. A text and evaluation facility will be set up to assist in the introduction of automation by robot.

In the meantime there are several government schemes available to help firms interested in projects involving robot applications including the product and process development scheme, selective investment scheme and the microprocessor application project. In addition the department's nine research and development requirements boards are able to assist with projects involving a large R&D element.

Besides the assistance available through the department, the National Research Development Corporation has funds to invest in new technology and would particularly welcome projects for the development and application of industrial robots.

NEL has been engaged in the application of robots to welding operations.



Industrial robots in largest show in UK

Robots 79, the first major UK industrial robot conference and show at the University of Nottingham on 27 to 30 March is sponsored and organised by the British Robot Association. Both the conference and exhibition will focus on the latest developments and equipment available in this area of manufacturing technology.

Four major conference sessions are planned at which 22 recognised experts will participate. The robot application session will highlight experience gained in the UK in using robots for palletising, arc welding, the plastics industry, in die casting and many other areas. Other sessions will deal with new equipment on the UK market and current R&D trends including information on mobile robots. The final session will review social and economic aspects, governmental involvement in the UK and Europe and other general interest topics. The exhibition will feature the largest display of industrial robots ever held in the UK with more than 20 types on show.

Further information and free exhibition tickets are available from the British Robot Association, 39 High Street, Kempston, Bedford MK42 7BT, tel. Bedford (0234) 853605.

UK viewdata expertise aids Dutch private service

Insac, the computer software group set up by the National Enterprise Board, and Applied Viewdata Systems Ltd, a British consultancy bureau, are to assist Dutch United Publishers (Verenigde Nederlandse Uitgerersbedrijven – VNU) to set up the first private viewdata service in Europe. VNU, one of the main Dutch publishing groups, will make the first installation of a GEC computer in March.

VNU's viewdata computer will be used both to service the market of closed user groups and for internal use, as the group comprises publishing companies all over Holland. Also VNU has set up a consultancy bureau to advise interested companies, institutions or authorities on how to use viewdata. In connection with this consultancy, seminars on specific application fields will also be organised and a viewdata newsletter published.

VNU has concentrated all its viewdata

expertise into Toegepaste Viewdata Systems (TVS). TVS is a part of Intermediair which is a publishing company with VNU's business press group. Intermediair is best known for the weekly publication of the same name, which is sent to 20 000 graduates in Holland. It also has interests in database publishing and represents NTIS in Holland. NTIS is the national technical information service of the United States government.

When it became clear that viewdata would cross the North Sea, Intermediair completed an agreement of co-operation with Applied Viewdata Systems Ltd (AVS), an associated company of New Opportunity Press Ltd, which has developed Careerdata on Prestel, the UK Post Office's viewdata system. Intermediair will offer Careerdata in the Dutch speaking countries. A similar relationship has been set up with Insac, the software group of the National Enterprise Board, which also markets viewdata for the British Post Office in the United States.

Insac will assist TVS in the software and marketing areas and Sam Fedida, the inventor of viewdata, will be actively involved in the introduction of viewdata in Holland. Together with its own resources, TVS combines enough viewdata know-how to act as a consultant for its clients.

The activities of Intermediair have been developed in continuous consultation with the Dutch Post Office authorities who will also install a viewdata computer. A direct line to connect the computers of the Dutch Post Office and TVS is being studied to enable users to have access to information from both computers. Intermediair expects to start viewdata applications on a large scale in 1980.

Marketing group aims for competitive engineering industry

Recognition that the engineering industry's future commercial success depends on identifying, anticipating and satisfying customer requirements profitably against tough competition at home and overseas led to the establishment of the Engineering Industry Marketing Group (EIMG). A second meeting of the group is to be held on the afternoon of 29 January at the Institution of Electrical Engineers, London. Harold Norris, director and commercial manager of BICC General Cables Ltd, is to pose the question, 'Who needs a marketing department?'.

Set up by the Institute of Marketing, EIMG is expected to become the largest specialist industry marketing group, with its membership of practising marketing personnel drawn from engineering companies and affiliated members from top management of other sectors of the engineering industry, such as design, R&D, production and accounts.

Activities of the group will take the form of providing forums for the expansion and interchange of ideas and experience with the provision for study in depth of marketing problems peculiar to the engineering industry, with a workshop for discussion and talks, case analysis and problem solving geared specifically to the needs of those participating.

Further information: contact Clive Linnell, EIMG, Moor Hall, Cookham, Berkshire SL6 9QH, tel. Bourne End 24922.

Sixth-formers gain first-hand experience of industry

The headmaster of Morecambe high school, Mr J. D. Foster, with some of his pupils during a work experience course run by Cumbria papermakers Henry Cooke Ltd. Sixth-formers from the school have spent a week at Henry Cooke to gain first-hand experience of careers in industry. Course places were limited to pupils with a special interest in an industrial career and of the six chosen by the school four were girls. The reduced numbers meant a much more personal and individualised approach, including a meeting with parents addressed by the general production manager. Besides gaining an insight into the paper industry, the youngsters also learned about the importance of forward planning, quality control, product development and exporting.

Industry catalogued in Mid Glamorgan information system

Some 380 firms, accounting for almost two-thirds of manufacturing employment in Mid Glamorgan, are included in what is believed to be the most advanced industrial information system in Britain. Launched this month by Mid Glamorgan County Council and codenamed Indis, the system provides details of the products of manufacturers based in the county, together with information on their use of materials, components and services.

Industry's response to Indis has been enthusiastic, and the county council is now seeking a way to develop it further and place it on a permanent footing. Information from Indis is available to firms in Mid Glamorgan at present without charge.

It has been designed to provide manufacturers with information about resources available within Mid Glamorgan, so that business links between firms within the county can be increased. It has been found that most companies would prefer to purchase more of their requirements locally to cut transport costs and increase their control over delivery and quality, but often they do not do so because of lack of knowledge of local suppliers, even though these often exist.

Mid Glamorgan County Council established Indis with assistance from the Manpower Services Commission under the job creation programme, and it has been extended under the special temporary employment programme. The project has been directed by the county council's intelligence, research and development unit, and the project team has developed its own computer systems with the assistance of the Polytechnic of Wales computer centre.

The first stage of the project involved producing a Mid Glamorgan industrial directory. This was published in April 1978 and copies were sent free of charge to all firms in the county. A 1979 edition is now being prepared.

The directory included all manufacturing and related service sector firms in Mid Glamorgan, together with a comprehensive guide to incentives and services available to industry. Such a guide is not available elsewhere, and county council staff found that many managers did not know of the full range of government incentives and services available to them.

The second stage of the project has involved a series of detailed interviews with 380 firms in Mid Glamorgan, to collect information for the system. About three-quarters of these took advantage of an inquiry referral service also offered by interviewers, leading to over 1800 individual requests for information or assistance of one kind or another.

Further information is available from Indis IRD Unit, Mid Glamorgan County Council, Room H001, Polytechnic of Wales, Treforest, Pontypridd.

New products

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Greater realism with driver trainer

As realistic as actually driving a car on the road, is the claim made by RFD Engineering Ltd for its new driver trainer. In it a learner driver can correct mistakes as they happen – all in the safety of the classroom. Complete with accelerator, brakes, clutch and normal instrument facia, the Auto-tutor is transportable and is available in left and right-hand drive. There are also bus and lorry versions.

The Auto-tutor uses a back projection system designed so that a learner can drive round a mock circuit at a speed responding directly to the throttle, meeting road hazards and negotiating them as they appear. If the student doesn't listen to the simulated engine noise or check the speedometer, or takes a corner too fast, the car will go off the road – the driver seeing in the screen a realistic simulation of the driving error. The learner must then manoeuvre the car to get back on the road. When attempting hill starting the car convincingly rolls backwards if the driver fails to carry out the correct procedure.

Instructor's controls situated at the back of the driver's seat can be used to programme in such things as emergency stops. A readout will indicate to the nearest one hundredth of a second how long it took for the pupil to react. There is also a rotating switch that 'builds-in' an incline up to 1:3 and various warning lights can be made to flash to see how a learner driver reacts to them.

Further information: circle 273

The simulated car convincingly 'rolls backwards' if the driver fails to carry out the correct procedure for a hill start.

Automatic adjustment of cut saves metal

An automatic depth-of-cut adjustment system has been developed by the Loewy Robertson division of Davy-Loewy Ltd for its strip and slab milling machines. Designed for fitting to new or existing under and over cutter machines, it increases the yield of useable metal, minimises operator intervention and avoids cutter damage due to human error.

The system incorporates a pair of measuring rolls at the entry end of the machine to sense the thickness of the incoming strip or slab. This measurement allows the position of the upper and lower cutters to be adjusted continuously while the machine is on load to compensate for longitudinal taper in the stock. The result is that an even depth of cut is taken off both faces irrespective of thickness variation over the length of the workpiece.

Manual measurement of workpieces before milling is eliminated and there is no need for an operator to monitor the depth of cut during milling. An interlock is also provided so that when a workpiece of abnormal thickness is detected, feed is interrupted until the system has reset the cutters to receive it. Loewy Robertson claims that the system can automatically maintain the depth of cut per side preset by the operator to within 0.05 mm, provided that the incoming stock is within commercially acceptable limits.

Further information: circle 274

High-strength and economical resin rubbers

A range of high-strength resin rubber compounds, which are claimed to be cheaper than polypropylene and easier to work than ebonite, has been developed by Chloride Lorival Ltd. The new 2190 series materials, reinforced with synthetic resins, are manufactured in volume at Bolton, and are available with a broad range of impact values and crossbreak strengths.

Supplied in unvulcanised sheet form in varying thicknesses, they are similar in appearance to hard rubbers, but with much greater strength. They may be vulcanised, depending upon size and complexity of product up to six times faster than hard rubbers, at moulding temperatures of around 140 to 150 °C. When moulded, the materials become extremely hard, but not brittle, and have good abrasion resistance.

The 2190 series resin rubbers offer excellent resistance to the majority of corrosive chemicals, and this feature makes them particularly suitable for application as filter, tank or pipe lining mediums in the manufacture of process plant. In addition, these resin rubbers, with an electrical resistance similar to that of ebonite, form an economical alternative for the manufacturer of electrical components. The materials may be easily bonded to metal and other forms of re-inforcement.

Further information: circle 275

Impact-torque tools checked rapidly

Peak torque delivered by power-driven impact tools can now be rapidly checked with the Crane Electronics Ltd's impact-torque calibrate system.

Most powered fastening tools deliver the required torque by applying to the fastener a series of intermittent torques that vary from as low as zero to the maximum value set. Impact-torque calibrate records the largest single peak of torque and is particularly suitable for use by quality control personnel for setting and checking tools used on any assembly line where torque applied to fastenings must be closely controlled.

The system is powered by rechargeable batteries providing 4 to 6 hours continuous operation. The torque recorded is measured to within ± 1 per cent and displayed on a red digital read-out. Impact-torque calibrate is supplied in nine separate ranges for use with most powered fastening tools from the largest to the smallest.

Further information: circle 276

Peak torque recorded instantly.

European community news

Prospects of MTN agreement by year end

Prospects of concluding the Tokyo round of the multilateral trade negotiations by the end of 1979 are looking hopeful. Statements issued by the European commission and the United States delegations, and by the Japanese and United States delegations, say that major differences have now been resolved in most areas.

The joint statement of the European commission and the United States, released in Geneva on 22 December, noted that significant progress had been made, both multilaterally and bilaterally, across the full range of subjects under discussion.

Differences on non-tariff measures had been essentially resolved and major elements for a final balance in the agricultural sector were now ready for discussion. These are commodity arrangements covering meat, dairy, and grains, a series of non-tariff understandings, and reciprocal bilateral agricultural concessions.

On tariffs, the major elements for a substantial deal were now present, but further bilateral negotiations would be needed to reach a mutually satisfactory agreement, reflecting a balance both in qualitative as well as quantitative terms.

Broad agreement had also been reached on a series of non-tariff measure codes, covering subsidies/countervailing measures, government procurement, standards (technical barriers to trade), customs valuation, licensing, and an agreement in principle on trade in counterfeited goods.

The delegations stated that these arrangements as a group established the foundation for a more modern, disciplined and fair trading system. These codes made up the keystone of the Tokyo round and represented the first time that non-tariff measures had been dealt with on such a broad scale in the course of multilateral trade negotiations.

No remaining differences existed between the delegations on the series of framework agreements now nearing a full multilateral accord. These set out a series of reforms of the general agreement on tariffs and trade practices, as well as new provisions of special importance to developing countries. These include an enabling clause covering special and differential treatment and graduation, an understanding on balance-of-payments measures, a clarification of procedures for handling dispute settlements, and an understanding on export restrictions.

The delegations had developed a basis for an understanding bilaterally in the safeguard sectors but they wished to pursue this topic further in a multilateral context in order to obtain the broadest base of consensus possible among negotiating partners before finalising their positions.

The tariff work remaining was still difficult and time-consuming , the statement went on, *and would be carried on in the first part of* January. The last steps largely concern achieving *a mutually acceptable balance. The delegations* said that this balance was not only *bilaterally, but also multilaterally, important* since the European community and the United States accounted for more than 40 per cent of world trade.

President Carter started the process of congressional consideration of the outcome of the MTNs on 4 January by giving formal notice, under the US Trade Act, of his intention to enter into a trade agreement. Congressional agreement to the final package is essential if the MTNs are to be successfully concluded.

The failure of the United States congress to extend the countervailing duty waiver beyond 3 January was a major hold-up in the negotiations last autumn. It is expected that the *United States Treasury will delay collection of* the countervailing duties as long as possible so *that trade between the EEC and the United* States is disrupted as little as possible while *the new congress, which meets on 15 January,* considers further administration proposals to *extend the waiver. This follows assurances* from President Carter's special trade envoy, Robert Strauss, *that no effort would be spared* to prevent trade disruption.

Negotiations re-opened on 8 January in Geneva for final discussions on the package.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

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Textiles and clothing trade balance deteriorates as retail sales soar 79

Greece set to join community . . .

Greece is set to become the tenth member of the European community following the successful outcome of ministerial negotiations in Brussels on 21 December.

The transitional period for entry will in principle be five years, with seven years for just a few agricultural products (fresh and processed tomatoes, and fresh and canned peaches).

It will also be seven years before Greek workers are given full access to community countries.

A possible timetable for membership put forward by Greek foreign minister Mr Rallis would be to sign the treaty of accession by mid-summer. Parliamentary ratifications could be effected between July 1979 and July to August 1980 and entry into force would become effective in the second half of 1980 or early 1981.

On the question of a compensatory mechanism for fresh fruit and vegetables, the community agreed that its offer price would not exceed the level of the reference price applied in relation to third countries, and it would be reduced each year by 2 per cent.

The community also agreed to include cotton in the common agricultural policy, with the possibility of production aids. Aid to cotton seeds will be gradually granted during the transitional period.

The safeguard clause will be equal to that of the transitional period – five years in general and seven years for a few products only.

. . . and Spanish accession negotiations to start in February

Negotiations for Spain's entry to the European community will be formally started in February.

Main negotiations will begin as soon as the community has worked out its general negotiating position, perhaps in September.

Mediterranean textiles: *Smith outlines controls*

A 'warning bell' mechanism is one of the tighter and more comprehensive methods of *controlling 1979 textile imports into the EEC* from the Mediterranean suppliers.

In letters on 28 December to the British Textile Confederation and to the Trades

Union Congress, trade secretary John Smith, said that as a result of long and difficult negotiations following the EEC council of ministers on 19 December he had obtained 'clear undertakings that there would be more comprehensive methods for enforcing agreements than before'.

He explained that the warning bell mechanism would be used to set in hand action in good time when restraint levels were 75 per cent used.

Mr Smith commented that small increases in global ceilings for the import of the most sensitive textile products would be 'matched by a greater commitment to restraint from many of the exporting countries than we had a year ago'.

Mr Smith explained that it had now been agreed that:

☐ When a restraint level was 75 per cent used, consultation with the exporting country would be set in hand, enabling action to be taken in good time before, rather than after, individual limits had been breached (the 'warning bell' mechanism)

☐ The commission had agreed to engage safeguard procedures promptly if agreed limits were not respected or if consultations did not achieve a satisfactory result

☐ Where it was not possible to reach a negotiated solution with a particular country the commission would notify that country of the overall (EEC) and regional (member state) limits which should not be exceeded; these limits will be based on the present allocations within the global ceilings where these exist or, where they do not, on 1977 patterns of trade.

'As a result,' Mr Smith said, 'we have ratified the agreements already negotiated, ad referendum, by the commission with Greece, Spain and Morocco and we have agreed on the basis for continued negotiations with other suppliers.'

Mr Smith believed that these arrangements should help to maintain the confidence of the UK industry in the government's determination to obtain effective restraints on imports of low cost textiles.

French assume EEC presidency

France took over the presidency of the council of ministers and its dependent bodies from Germany at the beginning of the year. The presidency lasts for a six-month term.

General sessions will be chaired by the foreign affairs minister Mr J. Francois-Poncet, and the economy and finance sessions by Mr Monory. The committee of permanent representatives will be chaired by the French ambassador, Luc de la Barre de Nanteuil.

President Giscard d'Estaing will chair the two sessions of the European council which will be held in Paris on 6 and 7 April and in Strasbourg on 22 and 23 June.

Letters to the editor

Letters to the editor should be addressed to the Editor, *Trade and Industry*, Eighth floor, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

Argentine trade agreement renewed

At a ceremony in Brussels on 22 December the EEC and the Argentine Republic renewed a non-preferential trade agreement for a further one-year term from 1 January this year.

This provides for reciprocal liberalisation of trade and co-operation in the agricultural sector. The agreement includes special provisions for the import of certain beef and veal products from the Argentine.

The Argentinian ambassador to the European communities Elvio Baldinelli, signed on behalf of the Argentine, and Helmut Sigrist, ambassador of the German permanent representation in Brussels, and Dr Manfred Caspari, deputy head of the external relations directorate-general at the European commission, signed on behalf of the EEC.

Plan EEC coal supplies to next century – committee says

Support should be given to sustain the European community's coal industry over the next few years. This is one of the recommendations in a report on the position of the community's coal industry by the house of lords' select committee on the European communities.

The committee emphasised the importance of reducing the community's dependence on imported energy supplies and of at least maintaining its capacity to produce coal.

The select committee had been asked to report on the European commission's consultative document on the community's coal industry. The commission's document drew the council of ministers' attention to 'the progressive deterioration in the position of the community's coal industry'.

The committee comments that the community has made no substantial progress so far in improving its long-term energy supply situation and was once again exposed to new demands by the oil-exporting countries.

The commission reminded the community's institutions, in its document, of their responsibility for achieving the energy political goals formulated in 1974. These included medium-term guidelines for coal for 1975 to 1985. The target for community demand for hard coal in 1985 was set at approximately 300 million tonnes of coal equivalent (mtce). When this target was set, community coal production was in excess of 250 mtce annually. Since then, however, production has fallen to 220 mtce in 1977, while imports have increased substantially from the target level of 50 mtce annually.

The committee feels that the community should be primarily concerned with the longer-term – up to the early years of the next century – rather than just up to 1985. But, so far, the commission has not proposed any energy policy beyond 1985. In considering the future of the community coal industry, the committee had therefore to rely mainly on estimates of energy supply and demand made by the British government for the UK in the year 2000.

The National Coal Board plan, 'Coal for the future', placed the UK demand for coal in the year 2000 within the range 135 to 200 million tons. The committee's report says that the government emphasises, in its analysis of the relative costs of different fuels, the need to avoid committing investment to a fuel which may be expensive relative to others in the future. The committee feels, however, that by the year 2010 the problem might be not just to cover the community's total energy needs at the lowest cost, but to cover them at all. If the price of oil goes up towards the end of the century, the committee feels it might be too late to produce coal in sufficient quantity.

The committee therefore considers that if a larger, more imaginative, programme for the coal industry could be established in the community and the UK, there would be a strong case for further investment. In addition, greater research and development effort could favourably alter the present judgement of the coal industry's future.

The committee therefore hopes that the government will give substantial support to longer-term projects. Ideally, the committee would hope for co-operation between member states. If this did not happen, however, the UK should take the initiative.

The report concludes that, as the only other assured long-term energy source apart from coal is nuclear power, coal should be developed to the maximum possible extent before there is a disastrous energy shortage. The report has been submitted to the house of lords for debate.

Duty suspended on South Korean iron and steel imports

The European commission has suspended a definitive anti-dumping duty on imports into the EEC of certain iron and steel products originating in the Republic of Korea. The full description of the goods is:

Tariff heading/Description
73.08 A and B Iron or steel coils for re-rolling, originating in the Republic of Korea

The suspension of the duty took effect on 18 September 1978 and any duty paid on these goods imported into the UK after 18 September 1978 will be repaid.

The commission has also decided that security given on imports of these goods will be repaid on:

☐ deliveries made under contracts concluded before 20 December 1977, which contain no price revision clause permitting an adaptation of the contract prices to the basic prices applied in the community

☐ deliveries made under the contracts referred to above and destined for shipbuilding yards within the community.

Any importer likely to qualify for repayment of duty or security should apply to HM Customs and Excise, ICC3, Room 262, King's Beam House, Mark Lane, London EC3.

Alleged dumping of iron and steel products from Greece and Brazil

Information has been received by the European commission indicating that dumping is being practised or that bounties or subsidies are being granted for imports of the following products and that this is causing injury to a community industry

☐ iron or steel coils for re-rolling (CCT heading 73.08, Nimexe codes 73.08-01 to 73.08-49) originating in Greece

☐ graphite spheroidal pig iron (CCT subheading ex 73.01 BIII, Nimexe code 73.01-27) originating in Brazil.

In conjunction with the member states, the commission has begun examining these matters at community level in accordance with recommendation 77/329/ECSC on protection against dumping or the granting of bounties or subsidies by countries which are not members of the European Coal and Steel Community (ECSC), as amended by recommendation 3004/77/ECSC.

Information on these matters may be sent in writing to the Commission of the European Communities, Directorate-General for external Relations, 200 Rue de la Loi, B 1049 Brussels.

Interested parties may, by 26 January, make known their views in writing, in particular by replying to the questionnaire addressed to the parties known to be concerned and by providing supporting evidence.

The commission will also hear parties directly concerned who so request when making known their views to the commission, provided they can show that they have an interest sufficient to entitle them to express their views more fully.

It would be helpful if copies of all representations to the commission could also be sent to the Department of Trade's Anti-Dumping Unit, Room 348, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ.

Anti-dumping investigations terminated by commission

The European commission has announced the ending of the following anti-dumping investigations:

Wood pulp, from Canada, United States, Finland and Sweden

Because of developments in the market circumstances the commission does not consider it necessary, at present, to introduce defensive measures against imports of chemical woodpulp originating in Canada, United States, Finland and Sweden. (Investigation announced in *Official Journal* C89, 12 April 1978).

Plywood from S. Korea

The commission has decided to terminate the investigation (announced in *Official Journal*, C129, 3 June 1978) having concluded from South Korean prices that dumping is not taking place.

Rayon yarn from Greece

The commission has accepted a satisfactory undertaking from Greek exporters of viscose rayon (investigation announced in *Official Journal* C197, 18 August 1978) and it considers that protective measures are not now necessary.

Investigation into herbicides dumping opened

An anti-dumping investigation has been opened by the European commission based on allegations that dumping is being practised or that bounties or subsidies are being granted for imports of herbicide originating in Romania, and that this is causing injury to a communtiy industry.

The product falls under CCT heading 29.07 C III; Nimexe code: 29.07–59. Interested parties may make known their views in writing by 28 January 1979.

Representations should be sent to the Commission of the European Communities, Directorate-General for External Relations, 200 rue de la Loi, B-1049 Brussels, and should be copied to the Department of Trade's Anti-Dumping Unit at Kingsgate House, 66–74 Victoria Street, London SW1E 6SJ. The full text of the commission's announcement was published in the *Official Journal of the European Communities* C311, 29 December 1978.

Value limits increased in EEC/Efta preference trade

From 1 January the European unit of account (Eua) replaced the unit of account (ua) in protocol 3 of the EEC/Efta free trade agreements. Also from that date the value limits for the use of form EUR2 and for consignments of low value for personal or family use were increased:

Form EUR2, 2400 Eua (equivalent to £1,600), formerly 1500 ua (equivalent to £630); goods in travellers baggage for personal or family use, 480 Eua (equivalent to £320), formerly 300 ua (equivalent to £126); goods sent by private individuals to private individuals, 165 Eua (equivalent to £110), formerly 100 ua (equivalent to £42).

Apart from these increases in value limits, there are no changes in the conditions relating to the use of the simplified procedures set out in customs notices 826 (imports) and 827, section D (exports).

Inquiries: (level of limits) Department of Trade, General Division 2C, tel. 01-215 5750; (procedures) local customs offices or Customs and Excise, International Division C, tel. 01-626 1515 ext. 2279 (imports) or 2165 (exports).

More relief in retail export scheme

Increases in the value of goods eligible for relief from VAT under the retail export schemes for community travellers going to the EEC area have been announced by Customs and Excise. They will also apply to UK residents going to live in another EEC country for a continuous period of at least 12 months.

The changes, introduced on 1 January, mean that the value is now £120 compared with £50. But for Denmark the value will be £90 and for Ireland the value remains at £50.

The retail export schemes which apply to other overseas travellers are not affected by the changes. There are no official monetary limits for articles sold under these schemes.

The retail export schemes are procedures which allow a registered VAT trader to zero-rate the supply of goods sold to entitled persons. A community traveller is a person whose 'domicile, habitual residence or usual place of business' is in a member state of the EEC other than the UK.

A UK resident is a person who is neither a community traveller nor an overseas visitor.

UK receives £3.5m from agricultural fund

Fifty-one projects will receive grants from the EEC agricultural fund (Feoga) totalling £3,590,000 under the marketing and processing regulations.

The projects which will receive Feoga assistance fall into the following broad sectors:

£

	No. of projects	Grant
Milk and milk products	6	242 449
Redmeat processing and slaughterhouses	9	1 212 906
Fruit and vegetables	1	165 106
Flowers and plants	1	10 098
Fish processing	4	338 666
Cereals	7	651 118
Animal feedingstuffs	11	447 244
Seed processing	2	80 119
Eggs and poultry	9	404 561
Others	1	37 733
	51	3 590 000

In the first round of decisions announced in July 1978, 39 projects in the UK were awarded grants totalling £3,355,302.

The total aid awarded to successful applicants in the UK in 1978 amounts to £6,945,302.

EEC regulation 355/77 provides for grants to be made from the European agricultural guidance and guarantee fund (Feoga) towards projects improving the conditions under which agricultural products are processed or marketed. The regulation also applies to the processing and marketing of fish and fish products. In order to qualify for assistance, projects must guarantee economic benefits for primary producers.

Some duty-free allowances increased

Amounts of certain items of the duty-free allowances available to passengers entering the UK were increased on 1 January. The increases are:

1 for goods obtained duty and tax free in the EEC, or duty and tax free on a ship or aircraft, or obtained outside the EEC, the 'other goods' ie goods other than tobacco products, alcoholic drinks, perfume and toilet water, allowance is increased from £10 to £28;

2 for goods obtained duty and tax paid in the EEC the 'other goods' allowance will be increased from £50 to £120 and in addition the still wine allowance will be increased from 3 to 4 litres.

These increases give effect to agreements recently reached between the member states of the EEC.

New legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other member states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757 ext. 7174/482/408.

Common agricultural policy

The texts of the following regulations which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities*:

Fish and fish products. Regulation (EEC) 2903/78 amending annex II to regulation (EEC) 100/76 as regards squid (*Official Journal* L347, 12 December 1978).

Regulation (EEC) 2904/78 fixing the guide prices for the fishery products listed in annex I(A) and (C) to regulation (EEC) 100/76 for the 1979 fishing year (*Official Journal* L347, 12 December 1978).

Regulation (EEC) 2905/78 fixing the guide prices for the fishery products listed in annex II to regulation (EEC) 100/76 for the 1979 year (*Official Journal* L347, 12 December 1978).

Regulation (EEC) 2906/78 fixing the intervention prices for fresh or chilled sardines and anchovies for the 1979 fishing year (*Official Journal* L347, 12 December 1978).

Regulation (EEC) 2907/78 fixing the community producer price for tunney intended for the canning industry for the 1979 fishing year (*Official Journal* L347, 12 December 1978).

Regulation (EEC) 3000/78 amending annex III to regulation (EEC) 3559/73 laying down detailed rules for granting financial compensation and indemnities, fixing the withdrawal price and determining the buying-in price for certain fishery products (*Official Journal* L357, 21 December 1978).

Regulation (EEC) 3001/78 fixing for the 1979 fishing year withdrawal prices for the fishery products listed in annex I(A) and (C) to regulation (EEC) 100/76 and for certain products landed in areas very distant from the main areas of consumption in the community (*Official Journal* L357, 21 December 1978).

Regulation (EEC) 3002/78 fixing reference prices for fishery products for the 1979 year (*Official Journal* L357, 21 December 1978).

Regulation (EEC) 3003/78 fixing reference prices for tunny intended for the canning industry for the 1979 fishing year (*Official Journal* L357, 21 December 1978).

Regulation (EEC) 3004/78 fixing the standard values to be used in calculating financial compensation in respect of fishery products withdrawn from the market during the 1979 fishing year (*Official Journal* L357, 21 December 1978).

Cereals and rice. Regulation (EEC) 2944/78 amending regulation (EEC) 279/75 laying down detailed rules for the application of the system of tendering for export refunds on cereals (*Official Journal* L351, 15 December 1978).

Wine. Regulation (EEC) 2933/78 derogating from regulation (EEC) 1804/77 as regards the dates laid down for deliveries in connection with obligatory distillation for the 1977-78 wine-growing year (*Official Journal* L350, 14 December 1978).

Regulation (EEC) 2945/78 amending articles 5 and 11 of regulation (EEC) 2015/76 on storage contracts for table wine, grape must and concentrated grape must (*Official Journal* L351, 15 December 1978).

Regulation (EEC) 2946/78 authorising the conclusion of long-term private storage contracts for certain table wines for the 1978-79 wine year (*Official Journal* L351, 15 December 1978).

Regulation (EEC) 2947/78 authorising the conclusion of long-term private storage contracts for grape must and concentrated grape must in respect of the 1978-79 wine year (*Official Journal* L351, 15 December 1978).

Regulation (EEC) 3005/78 on the distillation for the 1978-79 wine year of wines suitable for producing certain potable spirits obtained from wine with a registered designation of origin (*Official Journal* L357, 21 December 1978).

Milk and milk products. Regulation (EEC) 2948/78 introducing private aid for Pecorino Romano cheese (*Official Journal* L351, 15 December 1978).

Regulation (EEC) 2949/78 amending the first indent of article 3(4) of regulation (EEC) 2054/76 on the sale for export to non-member countries of skimmed-milk powder held by intervention agencies and intended for use as feed to read 'by 28 February 1979 at the latest' (*Official Journal* L351, 15 December 1978).

Regulation (EEC) 2962/78 amending article 8 of regulation (EEC) 1391/78 with regard to the identity card arrangements introduced in connection with the system of premiums for the non-marketing of milk (*Official Journal* L352, 16 December 1978).

Oil and oilseeds. Regulation (EEC) 2980/78 amending regulation (EEC) 1204/72 laying down detailed rules for the application of the subsidy system for oil seeds (*Official Journal* L355, 19 December 1978).

Processed fruit and vegetables. Regulation (EEC) 2990/78 amending article 6 of regulation (EEC) 525/77 establishing a system of production aid for tinned pineapple (*Official Journal* L357, 21 December 1978).

Live plants and products of the flower growing industry. Regulation (EEC) 2991/78 amending article 2(1) of regulation (EEC) 316/68 fixing quality standards for fresh cut flowers and fresh ornamental foliage. The first indent of article 2(1) should be replaced by

'. . . within the Community, be displayed for sale, sold, delivered or otherwise marketed at the wholesale stage either by traders or directly by the producers' (*Official Journal* L357, 21 December 1978).

Business opportunities in ACP states

The Centre for Industrial Development (CID) was created specifically to implement the objectives set for industrial co-operation under article 36 of the Lomé convention.

The centre actively promotes industrial investment in the 54 African, Caribbean and Pacific (ACP) member states as a means of accelerating their pace of industrialisation, to encourage the transfer of technology from the European Economic Community, and encouraging the exploitation of complementary resources for mutual benefit.

The centre is not political nor is it profit-seeking; it is impartial and does not favour any special country and observes industrial secrecy.

Trade and Industry will be publishing from time to time details of projects or companies in the ACP states who are looking for EEC partners. This latest list follows. Firms interested in following up these items should contact the Centre for Industrial Development, Avenue George Henri 451, B-1200 Brussels.

Bricks

Cameroon: A private sponsor in the construction industry is looking for a technical and financial partner to help set up a small brick plant in Cameroon.

The envisaged scale of production is 15 000 tonnes per annum which represents approximately 7 million bricks per annum.

A brief project proposal may be obtained from the centre (Ref. 99/78).

Terry towels

Papua New Guinea: The Department of Labour and Industry is promoting a terry towel project at an annual scale of production of 500 000 m² to be increased to 700 000 m² within two years. Using imported materials the enterprise aims to diversify by producing continuous material for the manufacture of beach-wear etc.

The market assessment is based on import statistics: the average imports for the 7 years preceding 1975 were about 300 000 m² with a demand growth of 10 per cent a year (Ref. 100/78).

Poultry

Nigeria: An Oyo State poultry farmer aims to start production of 50 000 day-old chicks per week, to be increased to 100 000 per week within 2 years, using imported hatching eggs, but the growth of the poultry industry in Nigeria justifies the establishment of a national capability in this field.

The extent of investment sought would be 60 per cent local and 40 per cent foreign capital (Ref. 101/78).

Glass-reinforced plastic products

Nigeria: A private promoter is looking for a technical and financial partner for the manufacture of glass-reinforced plastic tanks, industrial and domestic components, sanitary ware, etc.

The anticipated production would be around 5 tons of finished product per week (Ref. 102/78).

PABX systems

Kenya: A local entrepreneur believes there is a growth market in small PABX systems sufficient to justify local assembly. Contact through the centre (Ref. 103/78).

Agricultural imports from Cyprus

Trade and Industry, 4 August 1978, page 266, gave details of the new terms for EEC agricultural imports from Cyprus contained in a new protocol (published in the *Official Journal of the European Communities* L172, 28 June 1978) to the EEC/Cyprus association agreement.

The *Official Journal* L350, 14 December 1978, contained the following correction to the text of this protocol:

Page 11 – article 2(1): The entry under CCT heading 07.01 ex T. Other, should be amended to read 'Aubergines, from 1 October to 30 November. 60(e).'

Harmonisation of legislation

Motor vehicles. The *Official Journal of the European Communities* L349, 13 December 1978, contains the text of directive 78/1015/EEC on the approximation of the laws of the member states on the permissible sound level and exhaust system of motorcycles.

Further information: Department of Industry, Vehicle Division, Ashdown House, 123 Victoria Street, London WC2N 6BQ, tel. 01-212 0386.

EEC information

The EEC Information Unit helps firms of all types and sizes by answering general questions about EEC membership.
The unit's address is:
EEC Information Unit,
Department of Industry,
1 Victoria Street,
London SW1H 0ET.
Tel. 01-215 4301 (six lines).

Overseas trade news

Singapore fast growing market – Smith

Singapore is one of the world's fastest growing markets and will welcome more UK investment. Trade secretary John Smith said at the end of his visit on 6 January that Singapore also welcomed more British technology, more UK know-how, and more joint ventures with British firms.

Mr Smith said that he and his party – composed of business and trade union leaders – had been impressed with the pace and scale of Singapore's progress and the scope and potential for further development.

The trade secretary said he had had a series of useful and friendly talks with the President, the prime minister, the finance minister and the foreign minister. They had reinforced his first impression that Singapore and its partners in the Association of South East Asian Nations (Asean) formed an increasingly significant group of nations and that their political cohesiveness was a crucial force for stability in south-east Asia.

With other members of his mission he had also spent several hours with the leaders of Singapore's commercial world.

The UK had had a long and historic relationship with Singapore and was involved in Singapore's growing prosperity. It continued to be one of the major foreign investors with 100 UK manufacturing firms based out there. British service industries, especially banks, insurance companies and consultants, were contributing to Singapore's role as a regional base.

Mr Smith said he had been delighted that the UK had been able to play such a key role in promoting EEC/Asean relations. This was the first mission of its kind from an EEC country since the EEC/Asean summit two months ago.

There had been two main reasons for the Singapore visit, Mr Smith said. He had wanted to demonstrate the importance the UK attached to maintaining and strengthening political and economic links with Singapore and Asean as a whole. The second reason was to explore how the UK could increase its two-way trade and economic co-operation with Singapore.

John Smith, Secretary of State for Trade (fourth left) at a briefing meeting with the businessmen who accompanied him to south-east Asia. Left to right (standing): Rex Browning, under-secretary at the Department of Trade; Sir Jack Wellings, chairman and managing director, The 600 Group; Harry Porter, joint managing director, Motherwell Bridge Engineering; Leslie Davis, president, Malaysia-Singapore Commercial Association. Seated: Denis Rooney, executive vice chairman, BICC; John Smith; Philip Shelbourne, chairman and chief executive, Samuel Montagu; Harry Jackson, commercial director, GEO.

. . . and businessmen follow up his visit

Following the trade secretary's visit, a 12-man mission, sponsored by the British Overseas Trade Board and arranged by the London Chamber of Commerce, flew to Singapore, Malaysia and Thailand on 5 January.

The mission, which is being led by Dr Paul Northcott, a director of a planning, engineering and management consultancy, W. S. Atkins and Partners, Epsom, represents many sectors of British industry, including manufacturers of brewing plant, oil pollution and telecommunications equipment, transformers and automotive tools.

Denis Rooney, chairman of BOTB's south-east Asia trade advisory group and executive vice-chairman of BICC, said that there were big contracts to be given in the area and British industry was increasing its export successes. 'However,' he said, 'it is still vital to overcome the great ignorance factor, especially among small companies, about what is often regarded as the dim and distant east.'

First quarter fairs boost for UK exports

Over 2400 British firms, supported by the British Overseas Trade Board, will be taking part in 111 trade fairs and seminars in 23 countries in the first three months of 1979. In addition, over 1300 firms, will take part in 79 BOTB-assisted outward missions to 41 countries. The board will also support two retail store promotions abroad.

At the international trade fair for home furnishing textiles being held from 10 to 14 January in Frankfurt a total of 136 British firms sponsored by the National Wool Textile Export Corporation, the British Carpet Manufacturers Association and the Irish Linen Guild, are displaying a large selection of textiles.

Fifty-nine British companies, under the sponsorship of the British Furniture Manufacturers Federated Associations, are exhibiting a range of designs and craftsmanship in furniture at the international furniture exhibition being held in Paris from 11 to 15 January.

Also in January there will be a British pavilion at the Asian international chemical and process engineering and contracting show (Chemasia) where 40 firms will demonstrate examples of Britain's chemical plant, equipment and process technology. This is being held in Singapore from 16 to 19 January.

Japan business course in London

The Japanese Chamber of Commerce and Industry in London is organising a course from 19 to 22 February, in collaboration with the City University Business School. The course is designed to provide businessmen, bankers, merchants and manufacturers, with an understanding of the financial and trading structures of Japan.

Speakers include I. Ohta, chief representative of the Bank of Japan, S. Oba of Mitsui and Company, who will cover third country markets and overseas manufacture, and T. Murakami of the Nomura Research Institute, speaking on Japan as a consumer market. There will also be lectures on the capital market, Japan's legal system, labour and taxation law, licensing, industrial relations, and the history of economic development in Japan.

The fee per person is £225, to include lunches and teas daily, course papers and reception.

Further details available from Mr R. S. Milward, general manager of the Japanese Chamber of Commerce and Industry, tel. 01-236 2060.

ECGD general purpose lines of credit

The table below lists lines of credit guaranteed by the Export Credits Guarantee Department under which there is capacity for further export business to be financed as at December 1978.

Departmental reference	Tel ext. at ECGD HQ	Recipient country	Borrower	UK bank	Unless otherwise stated these lines are for UK capital or semi-capital goods and services	Loan value £million	Minimum single contract value £'000s	Final date for entering into contracts
LC 499	298	Brazil	Banco Nacional do Desenvolvimento Economico	Lloyds Bank International Ltd		20	100	November 1978 (extension under consideration)
LC 773	7575	Bulgaria	Bulgarian Foreign Trade Bank	Lloyds Bank Ltd		2	20	19 March 1979
LC 774	7575	Bulgaria	Bulgarian Foreign Trade Bank	National Westminster Bank Ltd		3	20	6 March 1979
LC 819	7575	Czechoslovakia	Ceskoslovenska Obchodni Banka AS	National Westminster Bank Ltd		2	20	4 May 1979
49-0/990434/26	7575	Czechoslovakia	Ceskoslovenska Obchodni Banka AS	National Westminster Bank Ltd		2	20	25 September 1979
LC814	654	Egypt	Bank of Alexandria	Morgan Grenfell and Co Ltd		2	150	31 December 1978
53-0/262/990604/1	529	Ghana	Bank of Ghana	Standard Chartered Merchant Bank Ltd	UK capital plant equipment, machinery, vehicles and associated services	20 *	250 *	19 October 1979
LC 835	7575	Hungary	National Bank of Hungary	Morgan Grenfell and Co Ltd		5	15	21 June 1979
49-0/990302	7575	Hungary	National Bank of Hungary	Morgan Grenfell and Co Ltd		5	20	20 March 1979
LC 815	607	Israel	The First International Bank Of Israel	N. M. Rothschild and Sons Ltd		2	15	2 February 1979
LC 823	607	Israel	Industrial Development Bank of Israel Ltd	S. G. Warburg and Co Ltd		3	15	31 March 1979
49-0/78/331/990256/2	607	Israel	Bank Hapolim B-M	N. M. Rothschild and Sons Ltd		3	15	15 August 1980
LC 687	529	Kenya	Industrial Development Bank Ltd	Morgan Grenfell and Co Ltd		2	125	30 June 1978 (six months extension agreed)
LC 599	529	Kenya	Development Finance Co of Kenya Ltd	Manufacturers Hanover Export Finance Ltd		1	25	24 April 1978 (12 months extension agreed)
LC 760	7368	Korea South	Korea Exchange Bank	Lloyds Bank Ltd		10	20	31 December 1978
BC(MC) 42/99029	595	Mexico	Petroleos Mexicanos	Baring Bros and Co Ltd	Reimbursement facility for UK capital plant and services (for PEMEX only)	50 *	100 *	February 1980
43/0/990353	595	Mexico	Nacional Financiera SA	Barclays Bank International Ltd		20 *	200 *	7 November 1979
LC 700	7574	Poland	Bank Handlowy W. Warszawie SA	Lloyds Bank Ltd	Semi-finished and finished UK steel	30 *	100 *	2 March 1979
LC 745	7574	Poland	Bank Handlowy W. Warszawie SA	National Westminster Bank Ltd		5	25	9 May 1979
LC 807	7574	Poland	Bank Handlowy W. Warszawie SA	Morgan Grenfell and Co Ltd		5	20	21 April 1979
LC 846	7574	Poland	Bank Handlowy W. Warszawie SA	Morgan Grenfell and Co Ltd	UK produced barley	30 *	250 *	31 August 1978 (extended to 31 December 1978)
LC 836	7574	Poland	Bank Handlowy W. Warszawie SA	National Westminster Bank Ltd	UK artificial fibres and chemicals	30 *	120 *	10 April 1979
LC(FC) 801	607	Portugal	Sociedade Financeira Portuguesa EP	N. M. Rothschild and Sons Ltd		8 *	35 *	21 December 1978
LC 763	7575	Romania	Romanian Bank for Foreign Trade	Barclays Bank International Ltd		5	20	3 May 1979
LC 764	7575	Romania	Romanian Bank for Foreign Trade	National Westminster Bank Ltd		5	20	24 February 1979
LC 777	7575	Romania	Romanian Bank for Foreign Trade	Barclays Bank International Ltd		10	20	8 January 1979
LC 701	7575	Yugoslavia	Investiciona Banka Titograd	Lloyds Bank Ltd		10	10	31 October 1978 (may be extended to 30 April 1979)
LC 746	7575	Yugoslavia	Osnovna Privredno Investiciona Banka w Beogradu	Barclays Bank International Ltd		10	20	30 June 1979
59-0/78/731/990302/40	529	Zambia	Roan Consolidated Mines (RCM)	Morgan Grenfell and Co Ltd	UK plant and equipment for RCM's general mining purposes and associated services	4	10	30 October 1979
BC(MC)2/2/76/99045/10	529	Zambia	Nchanga Consolidated Copper Mines Ltd	Standard Chartered Merchant Bank Ltd	UK plant and equipment for the NCCM mine and associated services	4	40	4 March 1979

* Dollar figures.

Notes: 1 Requests for further information on any of these lines of credit should be made to the bank concerned or to Export Credits Guarantee Department, PO Box 272, Aldermanbury House, Aldermanbury, London EC2P 2EL (tel. 01-606 6699, extensions as listed in the second column). 2 Exporters when negotiating business which might be financed under one of the above lines of credit should ensure that their contract price contains sufficient margin to cover the cost of any premium payable. These details can be obtained from the bank concerned.

Notices to importers

Issued by the Department of Trade, Import Licensing Branch, Charles House, 375 Kensington High Street, London W14 8QH. Telephone inquiries should be addressed to the number at the end of the notice.

1723: imports of textiles from Hungary

The EEC commission has negotiated and initialled under the Gatt multifibre arrangement (MFA) an agreement with Hungary on trade in textiles for the calender years 1978, 1979, 1980, 1981 and 1982. The agreement provides for Hungary to restrain at agreed levels exports to the community of certain textile products intended for domestic consumption and will apply as from 1 January 1978. Pending announcement of community legislation to conclude the agreement its provisions are being operated de facto as set out in the following paragraphs. Should the subsequent legislation result in any change in the provisions outlined here a further notice to importers will be issued.

The textile items covered by the agreement are MFA categories 2, 3, 4, 5, 6, 7, 8, 9, 12, 13, 15B, 16, 17, 19 and 89, 20, 24, 25, 30A, 36, 39, 50, 67, 69, 73, 74, 76, 78, 83, 91, 100, 110, 111, 117 (for full descriptions see notice to importers 1691, *Trade and Industry* 28 July 1978). It is intended that the 1979 quota levels, not available at present, will be published with the quota levels for the other MFA bilateral agreement countries. The quotas will be administered by the Hungarian authorities who will issue export certificates which UK importers should send, together with a completed form ILB/A, to Import Licensing Branch at the address shown above. Import Licensing Branch will issue UK import licences up to the appropriate quota limit.

Existing restrictions

Details of quota levels for certain other textile

continued after supplement

STRATEGY NEWS

Trade and Industry monthly guide to developments in the Industrial Strategy

No 7 January 1979

Competing with imports

Raising the competitiveness of UK manufacturing industry to the point at which its market share increases and the whole economy benefits is the purpose of the Industrial Strategy. There has been growing concern in recent years about the performance of UK manufacturing industry in home and overseas markets. Not only has its share of export markets declined, there has also been a growing penetration of the home market by imports. The drive for improved competitiveness, with market share as the principal indicator of progress, therefore, binds together the whole work programme of the sector working parties (SWPs). In this issue of 'Strategy News', we examine the background to UK trade performance and describe the steps being taken by government and SWPs to compete with imports and increase UK industries' share of the home market.

Over the period 1970 to 1977, UK output grew less rapidly than in other major industrial countries. In common with these countries, the importance of trade in relation to gdp increased, but the UK remains more dependent on overseas trade in goods and services than other countries. UK trade performance, as measured by the ratio of the value of exports to the value of imports, declined between 1971-73, when the major economies of the world were expanding strongly together, and remained low in 1974, with the effect of the oil price rise.

Since then, however, there has been some recovery, partly because of North Sea oil and also because of an encouraging performance in exports. The volume of imports rose by just under one-third between 1970 and 1977 but the volume of exports rose by about a half. The terms of trade deteriorated over the period and, in 1977, the visible trade balance was worse than in 1970, although much improved on the period 1973-76.

Growth of manufactured imports

The most outstanding feature of the growth of imports is the part played by finished manufactured goods which more than doubled in volume terms over the period. Imports of semi-manufactures rose by over half, in volume terms, but fuels (reflecting the recent advent of North Sea oil) and basic materials fell, while the volume of food, beverages and tobacco remained relatively unchanged over the period. As a result, imports of manufactures accounted for a much greater proportion of the total volume of imports – 59 per cent in 1977 compared with 51 per cent in 1970. On the export side, the volume of exports of manufactures rose by just over 50 per cent between 1970 and 1977. In volume terms, manufactures accounted for some 82 per cent of the total in 1977, compared with 85 per cent in 1970.

Industrial performance

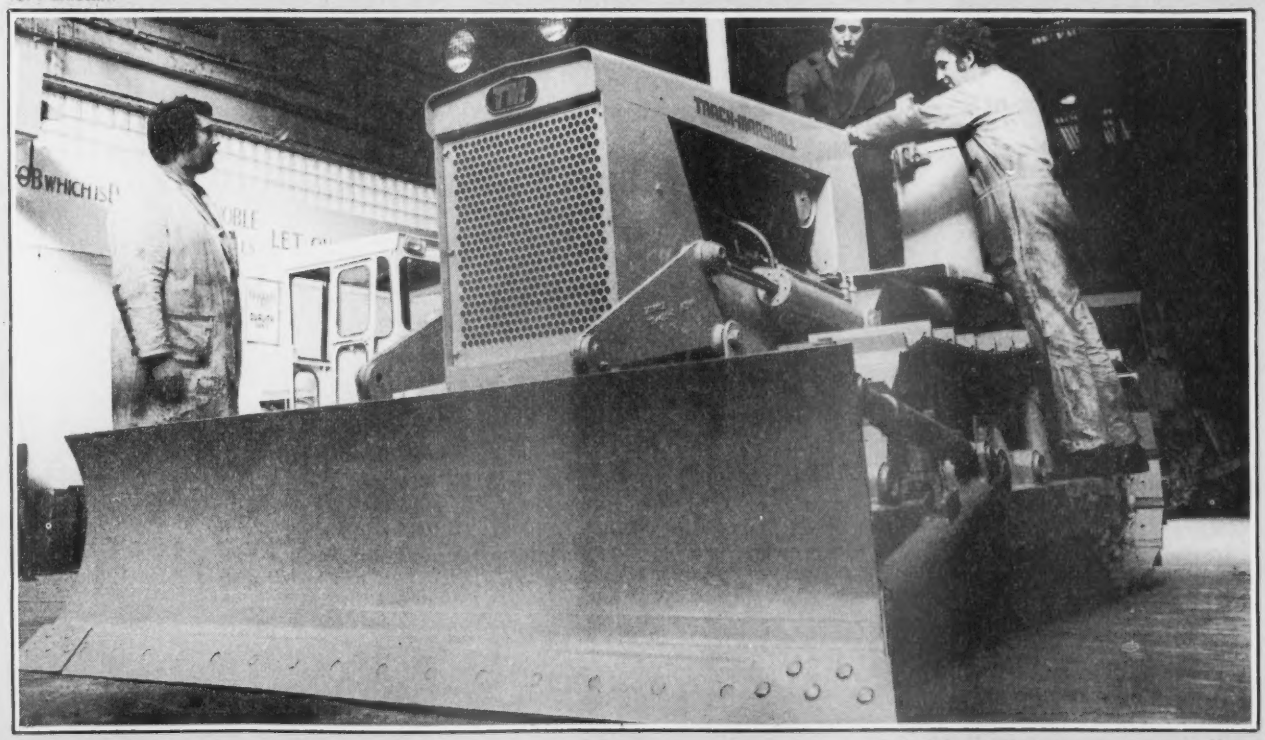
The table (page 2) shows how the import penetration and export sales ratios for the different industrial sectors within manufacturing changed between 1970 and 1977. The rise in the overall import penetration of manufacturing industry has been broadly matched by an increase in the export sales ratio. This general picture masks wide variations in the performance of individual industries.

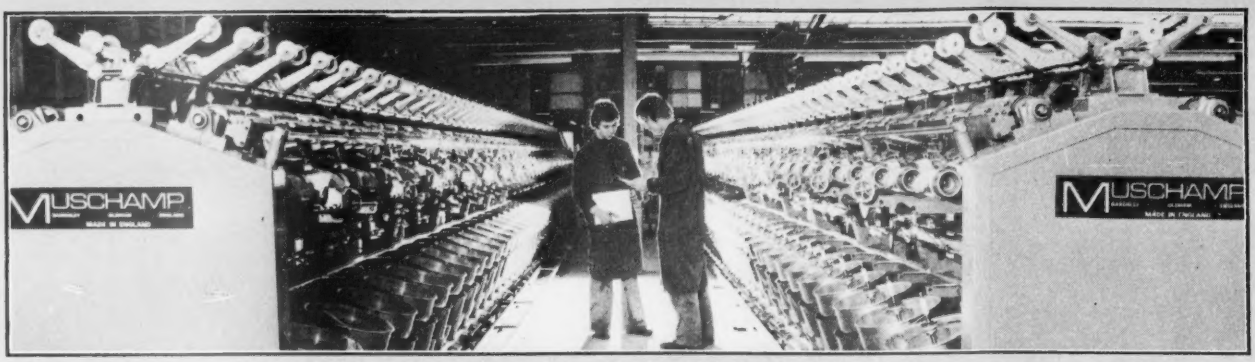
There were rapid rises in the import penetration ratios in most industries. A rise in these ratios is not necessarily undesirable: greater trade specialisation, involving both a higher level of exports and imports, leads to increases in both import penetration and export sales ratios. Taking account of both import and export ratios, there were particularly favourable trends in overall performance in food and chemicals and adverse trends in vehicles, electrical consumer goods and iron and steel.

Government is doing much to help achieve import substitution and fully supports all the sector working party activities, including those aimed at import substitution. Other key areas of government activity include:

- selective financial assistance provided for numerous projects in manufacturing industry which have resulted in significant import substitution. Thames

A contribution to Britain's export performance was made by Aveling Marshall's £3¼ million, recently completed contract for 160 bulldozers for Pakistan.





By September 1978, the government had approved applications for assistance totalling £29 million towards development projects in the textile machinery industry.

Tackling the problem

Sector working parties have been asked to give close consideration to the demands of the home market and the best way of satisfying them. They have also been asked to set objectives for import substitution in the next three to five years.

Import substitution objectives reported by SWPs show that, in a few cases, they are aiming at marked changes. Some objectives, however, are less striking – reducing import penetration by 10 percentage points or more for example, or preventing any further deterioration. But even these changes will be evidence of a considerable improvement in competitive performance by UK industries.

In some sectors, deficiencies in marketing effort have been identified. In others, there is clearly a substantial UK demand, but a weakness in the UK product range. In some cases, there are differences in the scale of output between some industries and their overseas competitors which can be so large as to make it very difficult in the short term for UK manufacturers to produce at a competitive price. Some industries have a total requirement for specialised components which is too small to interest suppliers organised to meet the demands of large-scale business: this problem can be exacerbated if requirements are further fragmented by a proliferation of purchasing specifications for individual users. In some cases, low levels of investment in the past have made UK industries unable to meet upsurges in demand, so that many customers' orders were permanently lost.

Adverse factors

Detailed buyer/seller work by SWPs has confirmed the importance of other adverse factors. These include faults in basic systems, such as production planning, quality control, stock control, estimating requirements and the planning of deliveries against contract. Manpower utilisation and productivity is another important issue.

The October issue of *Strategy News* referred to the exercise conducted by the specialised organics SWP aimed at finding UK suppliers of intermediates for the pharmaceutical industry. In some cases, the SWP knows of a UK supplier to meet a particular need. In others, where intermediates are required in small quantities by individual companies so that the amount each needs does not justify special production, it is sometimes possible to aggregate demand and make it a worthwhile proposition for a UK supplier.

Following the investigation by Nedo and government representatives, at least three pharmaceutical companies have had discussions with prospective suppliers which should result in a lessening of import penetration. The specialised organics SWP is hoping in the near future to introduce a market information scheme which will build up this type of liaison.

Product development

The Department of Industry's assistance scheme for the textile machinery industry was launched in August 1976. By September 1978, applications for assistance towards development projects costing £29 million had been approved. Product development in a number of other industries has also benefited under this scheme.

Marketing and customer liaison

In co-operation with the printing industry the printing machinery SWP is currently investigating reasons for the growing imports of printing machinery. A joint action team of technical and marketing specialists is working to identify areas of profitable growth potential for new products and ways to improve manufacturers' overall marketing programmes.

The printing industry is fielding panels of technical experts in printing and in book binding. Each panel will meet one manufacturer in the same speciality to discuss the detailed specifications and performance of new products under development, and also to identify areas of the market. where new products or marketing programmes are needed.

The clothing SWP has developed close links with the distributive trades economic development committee to discuss how closer manufacturer/retailer relationships might

Competing with imports

continued

Board Mills, for example, has been offered assistance under the selective investment scheme, a project which should benefit the balance of payments by £30 million a year from 1982 through import saving

- ☐ under the paper and board industry scheme, the balance of payments benefits associated with assisted projects should amount to £100 million a year in the 1980s, mainly through import savings
- ☐ the Department of Industry is having discussions with purchasing managers of major companies, with retailers and with wholesalers, to identify opportunities for import substitution
- ☐ the government is reviewing public purchasing practice to ensure that optimum customer/supplier links exist
- ☐ the Department of Industry continues to seek suitable opportunities to encourage inward investment.

Strategy News and your firm

If you would like another copy of this month's 'Strategy News' or think that another member of your firm or organisation would like to see it, ring 01-215 5021. We will send you a free copy.

Import penetration and export sales ratios: 1970 and 1977

Per cent

	Import penetration ratios [1]		Export sales ratios [2]	
	1970	1977	1970	1977
Food and drink	20	21	4	7
Coal and petroleum products	17	14	13	13
Chemicals and allied industries	18	27	25	37
Iron and steel	8	15	13	17
Non-ferrous metals	37	39	22	27
Mechanical engineering	19	30	33	45
Instrument engineering	34	53	42	56
Consumer electrical engineering	14	38	15	27
Other electrical engineering	18	35	24	42
Shipbuilding and marine engineering	43	51	29	35
Vehicles	12	36	33	45
Other metal products	6	12	12	18
Textiles	14	30	20	30
Leather, leather goods and fur	19	32	25	27
Clothing and footwear	12	26	10	19
Bricks, pottery, glass, cement, etc	6	9	10	15
Timber, furniture, etc	26	27	3	8
Paper, printing and publishing	19	22	8	11
Other manufacturing industries	9	17	17	20
Total manufacturing	17	25	18	25

[1] Imports as a proportion of home demand (manufacturers' sales of principal products plus imports minus exports). [2] Exports as a proportion of manufacturers' sales.

be established to reduce the import content of goods on sale in the shops. The Department of Industry and Nedo have jointly financed fieldwork by two agents to discuss with retailers why they prefer imported products and to determine how UK manufacturers can substitute for these imports. The project has already been very successful and many other firms have been alerted to the possibilities of import substitution and the need to improve liaison with retailers. This work is being continued and extended, and co-operation is being developed further up the line between the clothing industry and its supplying textile industries.

Increasing import penetration was also a matter of concern both for the food and drink machinery SWP and also for the industry's UK customers. A joint steering group of makers and users was formed to diagnose the problems and to find out in detail which types of machinery were being imported and why. The group identified brewing, baking, biscuits, meat, oils and fats, soft drinks, ice cream, chocolate and sugar confectionery as sectors where significant quantities of machinery were being imported.

Following interviews with major purchasers of equipment in these sectors, the group made a number of detailed recommendations in a confidential report to the industry, calling for closer maker/user links, improved marketing and product development, and maximum use of government assistance for R&D (see *Strategy News*, October 1978).

UK manufacturers' and retailers' practice of purchasing completed domestic appliances overseas for resale under their own brand names in the UK has boosted import levels in this sector, particularly in refrigeration and home laundry electrical products. The SWP has agreed to guidelines for manufacturers to encourage them to substitute for imports by the greater use of UK sources of supply. Planned increases in capacity and greater co-operation between UK manufacturers should enable import levels to be reduced. Manufacturers' imports of major appliances have fallen substantially during 1978 and import substitution will further reduce their foreign sourcing during 1979.

The key to the footwear SWP's approach has been the 'retail commitment'. Announced in May this year, and implemented in August, the commitment represents an understanding by individual retailers (those participating account for more than 60 per cent of all sales of footwear in the UK) to supply manufacturers with details of the type of footwear they are presently importing, likely future import trends, and the proportion of their total sales accounted for by imports. The purpose is to encourage closer face-to-face relationships between retailers, manufacturers, and their suppliers, so that measures to achieve import substitution are based on an improved awareness of present, and likely future, market opportunities. The effectiveness of this initiative will be closely monitored by the SWP which will also be seeking to strengthen and develop the approach, in conjunction with other measures designed to improve the competitiveness of British footwear.

At the invitation of the knitting SWP, the textile machinery SWP has set up a joint working party to analyse the UK knitting industry's purchases of imported machinery in recent years in the context of total machinery purchases; to consider future demand for the guidance of UK manufacturers and to report to the two SWPs with recommendations for action. Purchases by the UK knitting industry account for about a quarter of total imports of UK textile machinery and, from initial discussions, it is clear that many UK companies are keen to assist and encourage UK suppliers. The textile machinery SWP hopes to develop similar joint working groups with other customer industries.

Facing up to disadvantages of scale

The paper and board SWP covers an industry where Nordic and north American producers enjoy substantial advantages of scale, together with further advantages derived from integrated production in close proximity to forest sources. As a result, manufacture in the UK of many low-value, mass-produced grades has been under severe pressure, and the production of kraft papers became uneconomic. The industry has, however, combated this trend by developing waste-based papers which can compete with kraft papers in the packaging paper and corrugated case material market. Its producers have held their position in the packaging paper market by developing grades containing a high proportion of recycled paper in substitution for pure kraft grades. In the corrugated case material market, they have succeeded in improving their home market share from 46 per cent to 60 per cent between 1966 and 1976, largely by the substitution of waste-based liner for kraft liner. Other sub-sectors, notably newsprint, soft tissues and boards, are also using increased quantities of waste in their products.

In 1976, a £23 million industry scheme was introduced to encourage and assist the expansion of the paper and board industry's capacity to process and use indigenous fibre, the expansion of the industry's capacity to share waste paper, and technological innovation. By June last year, the £20 million allocated for grants to encourage capital investment in plant using indigenous materials was oversubscribed. By 24 November, grants totalling £16.2 million towards project costs of £69.6 million had been approved. These will increase the industry's capacity to use more waste paper by about 410 000 tonnes in addition to the existing usage of just over 2 million tonnes. Applications still under appraisal would, if approved, further increase the grants payable by over £10 million and the industry's waste-using capacity by nearly 200 000 tonnes.

Marketing information

The major manufacturers represented on the industrial electrical equipment SWP have pooled their market intelligence information on import destinations. The object is to identify the major user sectors of imported fhp electric motors which would be amenable to the development of an import substitution strategy.

TI Creda is one company playing its part in the import substitution drive. The company is to make automatic washing machines for Electrolux to replace one currently being imported from Italy. In return, Electrolux will manufacture a special range of fridge/freezers and freezers for TI Creda.

Diary

A number of TUC Industrial Strategy conferences are planned for the near future. These are part of the continuing efforts of government, management and unions to promote the Industrial Strategy. Details of forthcoming events are given below.

Date	Event
12 Jan	Plastics processing SWP conference, Newcastle
23	The Prime Minister addresses the TUC Industrial Strategy conference for electronic components, electronic computers, radio, radar and navigational aids sectors, London. The chairman will be *Geoffrey Drain, general* secretary, Nalgo.
26	Roy Hattersley addresses the TUC Industrial Strategy conference for textile machinery, mining machinery and mechanical handling sectors, Leeds. Frank Chapple, general secretary, EETPU, will act as chairman.
31	Alan Williams addresses the TUC Industrial Strategy conference for the domestic electrical appliance sector, Cardiff. Moss Evans, general secretary, TGWU, will be chairman.
Late Feb	Tony Benn addresses the TUC Industrial Strategy conference for the pumps and valves, heating, ventilating, air-conditioning and refrigeration equipment and fluid power sectors, Bristol. The chairman will be Terry Duffy, president, AUEW.

Serving industry offshore

Set up in 1976 to continue and develop the maritime work formerly carried out by the National Physical Laboratory, the National Maritime Institute (NMI) has a background of service to industry which dates back over 70 years. In this article, which continues our series on the Department of Industry's research establishments, we examine NMI's contribution to the goals of the Industrial Strategy, particularly in the offshore field.

NMI's three laboratories house facilities with a combined value of some £5 million. The majority of its towing and manoeuvring tanks and its water tunnels are at its Feltham headquarters; a marine trials base at Hythe on Southampton water provides support for tests under real sea conditions; and NMI's wind tunnels are to be found at Teddington.

The institute provides services for the investigation of a wide variety of maritime, hydrodynamic and aerodynamic problems. From experiments, often using models, it can give information leading to improvements in safety and efficiency at the equipment design stage and substantial savings in constructional costs. The institute also provides consulting and advisory services to industry.

NMI's work falls into four main categories: traditional work on ships; newer work associated with offshore structures; measurements and instrumentation at sea; and 'engineering aerodynamics' studies on the effects of wind on structures and the environment.

Work carried out directly for industry accounts for about 52 per cent of NMI's receipts. Government departments – especially those of trade, transport, energy and environment – make up the rest.

Ships

A large proportion of NMI's work for industry is concerned with the design and performance of ships' hulls. Although a lot is now known about the design of hull shapes for use in calm water, in order to ascertain the effects of waves, it is still necessary to supplement the predictions with model tests in water tanks. Seakeeping and manoeuvring qualities are also studied for a variety of sea conditions.

Ships manoeuvring in confined waterways or in the vicinity of other ships, especially in shallow water, are subject to interaction forces that can have marked, and possibly dangerous, effects on steering characteristics. A study of the problem at NMI under the sponsorship of the Department of Transport has resulted in important recommendations. These were embodied in an instructional film, used by many nautical colleges, shipowners and operators, aimed at the practising mariner.

In a similar project, with a more directly commercial application, NMI has made a study of the navigation of vessels through the Suez Canal. Various model-scale lengths of the canal, including bends and forks, were built at Feltham and navigated by radio-controlled model ships.

Offshore

The greatest increase in NMI's work has been in areas connected with the exploitation of offshore oil and gas. The need to use structures, fixed or floating and often of novel design, in a severe environment of waves, currents and winds has produced many direct commissions from constructors and consultants in the offshore industry.

In many cases, NMI can provide estimates of the wave forces and pressures on marine structures by use of a computer program (NMIWAVE), developed and verified by comparison with model experiments. Typical applications have covered gravity-based structures, tethered floating production and loading systems, barges and support vessels, floating breakwaters and energy extraction devices.

Where the computer program is not wholly applicable, recourse has to be made to model tests. One such case has been the testing of an array of flexible oil risers connecting the well-head on the sea bed to a tethered buoyant platform. Such a structure might be used in water too deep for a fixed platform.

The institute can also provide a prediction service on prevailing sea conditions all over the world.

Measurements at sea

NMI has built up techniques over the years for the measurement of such physical quantities as force, displacement, velocity, acceleration and pressure, particularly when these are related to the marine environment. Wave heights, water velocities within waves, currents, forces and pressures have been accurately measured and advanced methods for recording, transmitting and processing data have been developed. Equipment for conducting measurements in the field is now available in the form of portable units which can be assembled on site to give the equivalent of laboratory-based facilities. Typical uses of such equipment have been the monitoring of conditions on vessels on trials, the measurement of towing forces during tow-out of an offshore platform and, the measurement of wave energy devices in real sea conditions.

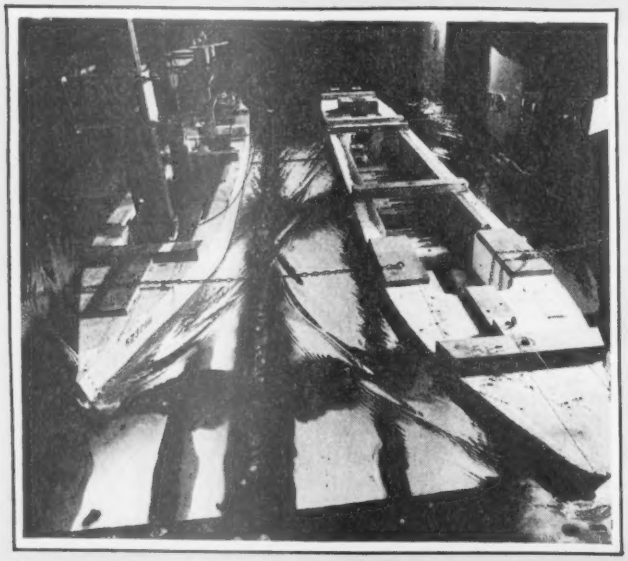
The institute has recently added a fully instrumented marine data station to its 'measurement at sea' capability – the Christchurch Bay Tower. The system can measure and record the effects of a known environment on devices attached to the tower or placed in the sea nearby. Clients may monitor their experiments remotely by dialling in to the onboard computer from their own premises. The facility is unmanned and operates continuously.

Typical of NMI's engineering aerodynamic work, is the testing of models of bridges and stacks in wind tunnels to minimise wind-excited oscillations in full-scale structures. Considerable contributions have been made in this way towards the safe and efficient design of modern bridges, towers and engineering structures. Other related work includes the determination of wind forces on buildings, ships and marine vehicles. In the field of offshore structures, air flow over helipads, paths of airborne effluents, and the behaviour of flare booms, are important areas of study.

Recent wind tunnel modifications provide for the production of wind flows modelled to correspond to those found in nature, with natural turbulence and with increasing velocity with height from the ground. These modifications give more realistic results than can be obtained from uniform flows.

Further information about NMI can be obtained from James Dawson, NMI, Faggs Road, Feltham, Middlesex, tel. 01-977 0933.

Measurement of ship-ship interaction forces in NMI's large circulating water channel.



Offshore R&D

Comprehensive R&D for the world's offshore industries is provided by the British Offshore Research Group (Borg). Formed in 1977, Borg represents a concerted effort to market internationally the facilities and knowledge of the UK government's research establishments.

Operating from the National Maritime Institute at Feltham, the group comprises NMI itself; the National Engineering Laboratory at East Kilbride, on the North Sea industry's doorstep; the Hydraulics Research Station at Wallingford; and the National Corrosion Service, an advisory service of the National Physical Laboratory at Teddington.

Borg has been involved in several successful collaborations with industry. One such is the development, in collaboration with offshore operators UDI and P&O Subsea, of 'seabug', a remotely controlled seabed vehicle. The group is a major contractor in a large programme funded by the Department of Energy, covering a series of related metal fatigue and fracture studies.

Further information is available from Borg, PO Box 10, Feltham, Middlesex TW14 0LN, telex 263118.

items not covered by quotas established under the EEC/Hungary agreement are set out in notice to importers 1718, *trade and Industry*, 5 January 1979.

Newly restricted goods

Existing surveillance licences for goods of certain tariff headings which, under the definitive arrangements coming into force on 1 January 1979, include newly restricted goods will be revoked with effect from 1 January 1979. In cases where the goods which traders intended to import under such licences are not subject to the new restrictions, traders should make fresh applications to Import Licensing Branch. Under these arrangements existing surveillance licences will be revoked for goods of the tariff headings and MFA categories indicated below and originating in Hungary.

Tariff heading	MFA category
59.08	100
ex 60.05	67
ex 60.06	67
ex 61.01	17, 76, 78
ex 61.02	76
ex 61.04	30A
ex 62.02	20, 39
ex 62.04	91, 110, 111

Imports for re-export

Imports of restricted textiles from Hungary will not be set off against the quotas if they are re-exported in the same state or after limited processing.

The general import licensing arrangements for restricted textiles re-exported from the UK are set out in notice to importers 1441.

UK import surveillance

In addition to the goods covered by this notice and by other notices to importers setting out restrictions on the importation of textiles, most other textiles and certain other items from non-EEC countries are subject to UK surveillance licensing arrangements. Descriptions of the goods and the licensing arrangements are set out in notices to importers 1694 and 1695.

Inquiries: Import Licensing Branch: tel. 01-603 4644 ext. 280.

More missions in 1978

In 1978 the British Overseas Trade Board supported more than 7700 firms at 317 trade fairs and seminars in 52 countries.

Additionally, representatives from over 3100 companies took part in 252 officially sponsored missions to 71 countries. The board also supported the promotion of British consumer products at 12 overseas retail stores promotions.

The board says that the level of trade fairs activity in 1978 showed a very small increase over 1977. But the number of outward missions rose by 12 per cent and the number of participants by 23 per cent.

1724: non-leather footwear from Taiwan

Notice to importers 1716, *Trade and Industry*, 24 November 1978, invited applications from traders for an allocation from any quota which might be established for 1979.

Such a quota has been established and at the same level as in 1978, ie 5.5 million pairs; allocations have now been made by Import Licensing Branch based on applications received in response to that notice.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 301/311.

1725: basic prices in force for iron and steel products.

Annex 2 to notice to importers 1969 set out the basic prices applicable to products covered by the surveillance arrangements for protection against dumping or the granting of subsidies by countries which are not members of the European Coal and Steel Community.

These basic prices are to be modified with effect from 15 January and full details of the new prices will be published in *Trade and Industry* on 19 January.

Meanwhile, traders wishing to complete applications for import licences in respect of imminent shipments may obtain specific details of the new prices by telephoning 01-215 3008 or 01-215 5771.

ECGD backs cereal loan

A $30 million line of credit which Morgan Grenfell acting on its own behalf and for the Bank of Scotland and Moscow Narodny Bank has made available to Bank Handlowy w Warszawie SA of Poland is being backed by the Export Credits Guarantee Department.

The loan will help finance contracts awarded by C. H. E. Rolimpex of Poland to UK exporters for the supply of UK-produced barley and wheat. Exporters will receive 85 per cent of the contract value from the loan; the remaining 15 per cent is payable from the buyer's own resources. To qualify under the terms of the loan a contract must have a minimum value of $250,000 and be placed by 30 September 1979.

ADVERTISEMENT SALES EXECUTIVE

Trade and Industry – Britain's leading weekly business magazine is looking for an experienced salesperson, aged 21-25 to join the four-man advertisement sales team.

A good salary, commission, expenses and car are available for the right person.

Call: Dudley Masters or Terry Day on 01-242 9478.

JAPAN

DISSATISFIED WITH THE LIMITED RESULTS ACHIEVED THROUGH AGENTS AND DISTRIBUTORS?

EXCELLENT OPPORTUNITIES await enterprising British manufacturers in the form of joint venture operations, wholly owned subsidiaries, branch sales operations and technological licence agreements in Japan. But in order to ensure that the best possible advantage is taken of such opportunities, it is absolutely essential to appoint a local representative possessing the necessary expertise and connections to act on your behalf. As Advisers and Consultants with years of experience of partner hunting and negotiations with Japanese manufacturers in the above sectors, we are pleased to offer our specialised services.

Y. NISHI, Managing Director
RAYDEN (JAPAN) LTD, Shokin Building, 11-12, 8-chome, Ginza, Chuo-ku, Tokyo, Japan. Tel: 571-8023/5. Telex: J26847 (Raydenco). Cables: Raydenco, TOKYO

Overseas trade exhibitions

Big lift at French handling fair

From Helen Taylor, British embassy, Paris

Paris' Palais de la Défense housed the seventeeth Salon International de la Manutention, held this year from 5 to 13 December.

The French market for mechanical handling equipment is estimated to be worth some 7.5 billion francs a year, and the UK is France's third supplier (after West Germany and Italy), so this event of world-wide importance is of special interest to British manufacturers. And this year's exhibition was quite an advance on the previous event, which took place three years ago. Exhibitors occupied an extra floor of the building and there was an increase of some 17 per cent in visitors.

A number of large British enterprises took part, including Lansing, exhibiting an impressive range of lifting equipment, and Perkins and JCB, through their French subsidiary companies. Exhibiting direct were nine British companies making up the joint venture sponsored by the Mechanical Handling Engineers Association and the British Overseas Trade Board. These included Coventry Climax, which has recently launched a serious offensive on the French market. The company was exhibiting for the first time with its French distributor, and received a number of interesting inquiries on the stand. The Sevcon Division of Technical Operations Ltd, main supplier of electronic controllers for electrical vehicles in France, also had a large number of visitors, including many from outside France.

Also exhibiting was Portec (UK) Ltd, demonstrating powered conveyor bends. The firm had an excellent show with a number of serious inquiries mainly from French customers, but also from visitors from other parts of Europe and the Middle East. Rocol Ltd, a first time exhibitor, was delighted with the number of inquiries from potential clients and distributors for its range of products, and in particular for its specialised lubricants and marking equipment.

Another first time exhibitor, Simon-Carves Ltd, succeeded in interesting the Marseille Port Authority in the new grain discharge equipment featured on the company's stand.

A change of venue is planned for the next exhibition, due to take place in 1981, to the Porte de Versailles Exhibition Park, which is a considerably easier building for the exhibitor, and the visitor, to negotiate. This will put the exhibition on the right track for further advances in the future.

Mr J. Burgess, managing director of Simon-Carves Ltd, and Richard Evans, minister (economic) at the Paris embassy, examining a model of Simon-Carves' grain discharging equipment.

Overseas trade export services

Two new terminals for Meadow's Scandinavian service

Two freight terminals in both Finland and Sweden will boost the Scandinavian export services of international freight forwarders Thomas Meadows.

The company's Swedish agent, Olsen and Wright, has opened a 23 000 m² terminal at Helsinborg. It was built to cope with the growing volume of international surface freight handled every day.

In Finland, Meadows' Finnish agent Oy Huolintakeskus AB has opened a new air-freight terminal at Oljyte within the area of Helsinki-Vantaa airport.

Cold-store area

This new facility, built to meet the increased demands of Oy Huolintakeskus's air-freight forwarding and chartering activities, offers 8000 m³ of space with a storage capacity of 500 m², which includes a refrigerated store area.

Coupled with up-to-date freight handling equipment, this large storage facility will speed the handling of export freight at the terminal.

Further information: circle 277

Constantine's new Italian agent

Constantine Wingate Forwarding Services is consolidating and further expanding its scheduled transport services between the UK and Italy with new partners in northern Italy, Societa Udinese Transporte e Spedizioni (Sutes). Driver-accompanied road trailers will be carrying groupage and full-load cargoes in both directions.

Sutes provides road services throughout Italy and has headquarters in Udine and Pordenone and facilities in Milan, Turin and many other centres. International operations, centred on Milan and Turin serve most European territories and are now complemented by the new agreement for the UK with Constantine Wingate Forwarding Services.

Further information: circle 278

To Japan – via Siberia

A fortnightly less-than-container-load (LCL) service between the UK and Japan using the trans-Siberian railway, has been launched jointly by Jeuro Container Line and Meadowsfreight.

Meadowsfreight, acting as the sole UK agent for the new service, is the newly formed surface freight division of international freight forwarders Thomas Meadows. The firm has extensive experience of Far Eastern markets.

The new service will initially accept LCL shipments from throughout the UK for Tokyo and Yokohama, though further Japanese destinations may be added later.

Outbound shipments from the UK will be routed from Tilbury to the Baltic port of Leningrad. Trans-Siberia railway block container trains will then move shipments to Vostochny on the Soviet coast of the sea of Japan for final transhipment to Yokohama and Kobe by feeder vessel. UK-Japan transit time will average 35 days.

Further information: circle 279

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Overseas trade country data

Argentina

Foreign exchange. The Argentine Central Bank has issued circulars RC 778 and 779, 1 September 1978, further liberalising foreign exchange transactions.

Circular RC 778 permits the free sale by authorised institutions of up to $20,000 or its equivalent in other currencies and allows the following transfers to take place without prior authorisation; cinematograph royalties, payment for technology, profits, dividends and income in general, repatriation of capital sums. Loans in foreign currency and the interest thereon remain subject to authorisation.

Circular RC 779 frees payments for imports and financial institutions no longer have to verify the terms of payment for imported goods. Limits on the transfer of representatives' and agents' commissions have also been removed.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Australia

Dental alloy. A notice in *Trade and Industry*, 8 September 1978, reported that the Australian government had received a request from local industry for temporary protection against imports of dental alloy, falling within tariff item 30.05.000.

The government has now referred the matter to the Temporary Assistance Authority for inquiry and report within 45 days. The public hearing will be held in the Public Inquiry Room, Industries Assistance Commission, King's Avenue, Canberra, ACT 2600 on 18 January.

UK firms and trade associations intending to submit evidence at the public hearing, should advise the authority as soon as possible at PO Box 80 Canberra ACT 2601. Evidence may be submitted through the accredited agent of the firm or trade association concerned, or through the Australian-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4PW, tel. 01-930 2524, who will represent UK interests if authorised.

The association charges a fee for its services, the amount varying according to the work entailed in the preparation of a submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319.

Ref: CRE 1461/78

Electric motors. A notice in *Trade and Industry*, 22 December, announced that the Australian government had requested the Industries Assistance Commission (IAC) to inquire into the question of protection for that sector of industry manufacturing electric motors, generators and rotary converters.

The IAC will hold public hearings as follows relating to the short-term assistance needs of electric motors of the alternating-current, three-phase, squirrel-cage, totally-enclosed, fan-cooled type with a maximum rating of 0.746 kW or greater but not exceeding 38 kW of a kind falling within tariff item 85.01.12:

Public Inquiry Room
12th Floor, Morland House
570 Bourke Street
Melbourne Vic
starting 10.00 a.m. 19 January 1979

Public Inquiry Room
16th Floor, 59 Goulburn Street
Sydney NSW
starting 10.00 a.m. 24 January 1979

UK firms and trade associations intending to submit evidence at the public hearing should advise the Industries Assistance Commission immediately at PO Box 80 Canberra ACT 2600. Evidence may be submitted through the accredited agent of the firm or trade association concerned, or through the Australian-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4FW, tel. 01-930 2524, who will represent UK interests if authorised. The association charges a fee for its services, the amount varying according to the work entailed in the preparation of a submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319.

Ref: CRE 1866/78

Vices. The Industries Assistance Commission has announced that as the final report on vices was not submitted to the government before 31 December 1978, tariff quota restrictions which were temporarily applied from 1 July 1977 will be extended to 30 June 1979.

The percentage factor will be 28.9 per cent from 1 January to 30 June. No extension of validity will be allowed beyond 30 June.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Fish, shellfish. Following a report by the Industries Assistance Commission the Australian government has announced the following duty changes:

16.04.200 Canned tuna, 15 per cent: (16.04.100 and 16.05.100 Fish products, 5 per cent.

The remaining goods under CCCNs 03.01, 03.02, 03.03, 16.03, 16.04, 16.05, will be free of duty.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Paper products. The Australian Industries Assistance Commission has issued a draft of its report on the question whether assistance should be granted to the sector of industry manufacturing paper products falling within tariff items 48.10, 48.11, 48.13-15, 48.17-20, 48.21.1, 48.21.2, 48.21.3, 18.21.9, 48.01.921, 48.07.69. The report is being made available to give interested parties an opportunity to examine and comment on it before final recommendations are submitted to government.

To receive submissions on the draft the commission will hold a further public hearing on Monday, 19 February 1979 at the Public Inquiry Room, Industries Assistance Commission, 16th Floor, 59 Goulburn Street, Sydney, NSW.

A copy of the draft report may be obtained on loan from Department of Trade, Room 336, 1 Victoria Street, London SW1H 0ET.

UK firms and trade associations who wish to submit evidence may do so through the accredited agent or the firm or trade association concerned or through the Australian-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4PW, tel. 01-930 2524, who will represent UK interests if authorised.

The association charges a fee for its services, the amount varying according to the work entailed in the preparation of the submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319.

Ref: CRE 1729/76.

Chile

Small imports amendment. A Central Bank circular published in the *Diario Oficial*, 18 December 1978, has amended the regulations governing small imports.

Importers in Chile can purchase foreign currency to pay for imports to a maximum amount of $3,000 fob without having to obtain an import permit. This is raised from $1,500 fob to $3,000 fob.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Fiji

Budget. Fiji's Finance Minister, Charles Stinson, introduced the 1979 budget on 17 November 1978. The government's estimated operating budget of 196.6 million Fiji dollars (F$) for 1979 is 14 per cent higher than 1978 and estimated capital expenditure is up 13.3 per cent to F$60.3 million as part of the government's policy to revitalise the economy. Capital programmes will have a bias towards generating or conserving foreign exchange and reducing unemployment.

It is estimated that total revenue for 1979

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757. In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

will be F$182.5 million leaving an operating deficit of F$14.1 million. It is expected that this deficit will be reduced by the new measures introduced in the budget to about F$4 million.

Features of the budget include:

☐ Duty increases on a variety of consumer goods including beer, wine, spirits, cigarettes and tobacco, vehicles, tyres and tubes, petrol, tinned fish and other food items

☐ Increases in revenue from a review of government services (licences, fees, stamp duty, etc)

☐ Higher interest on savings bank accounts and other interest-earning bank deposits and higher charges for overdrafts

☐ Fiji residents will be allowed to acquire up to F$5,000 a year in overseas portfolio investments and exemption from estate duty will be raised from F$10,000 to F$50,000.

Inquiries: CRE 01-215 5321.

Ghana

Import licensing. In notice to importers 430, 24 November 1978, the Commissioner for Trade and Tourism announced new import licensing procedures where a substantial number of items has been added to the list of prohibited goods.

Inquiries: OTAR 01-248 5757 ext. 472.

Republic of Guinea (Conakry)

Insurance. Following a presidential decree on 17 October all foreign companies gaining contracts for studies, construction, installation, exploration, etc, in the Republic of Guinea are obliged to cover all risks arising from these activities with the National Insurance and Reinsurance Company.

Copies of the decree are available from CRE 01-215 5334.

Indonesia

Import duty and sales tax. From 18 November 1978 the Indonesian government has introduced an exemption of 50 per cent on the import duty and sales tax chargeable on a wide range of materials when they are to be used for domestic industrial production.

The tariff headings affected are:

04.02.30	04.02.35	04.03.10	25.02.00	25.03.10	25.03.90
25.04.00	25.05.00	25.06.00	25.07.10	25.08.00	25.09.00
25.10.10	25.10.90	25.11.00	25.12.00	25.13.10	25.13.90
25.14.00	25.15.10	25.15.20	25.15.90	25.16.00	25.17.10
25.17.90	25.18.00	25.19.00	25.20.10	25.20.90	25.21.00
25.22.00	25.23.10	25.23.20	25.24.00	25.25.00	25.26.00
25.27.10	25.28.00	25.29.00	25.30.00	25.31.00	25.32.00
26.01.10	26.01.12	26.01.20	26.01.22	26.01.24	26.01.26
26.01.28	26.01.30	26.01.32	26.01.34	26.01.36	26.01.38
26.01.50	26.01.60	26.01.70	26.01.80	26.02.00	26.03.00
26.04.00	27.01.10	27.01.90	27.02.00	27.03.00	27.04.00
27.05.00	27.05 Bis	27.06.00	27.07.10	27.07.20	27.07.30
27.07.40	27.07.50	27.07.90	27.08.10	27.08.20	27.09.00
27.10.10	27.10.20	27.10.30	27.10.40	27.10.50	27.10.60
27.10.65	27.10.70	27.10.90	27.11.00	27.12.00	27.13.10
27.13.90	27.14.10	27.14.20	27.14.90	27.15.90	27.16.00
28.01.10	28.01.20	28.01.30	28.01.40	28.02.20	28.02.30
28.02.90	28.03.20	28.03.29	28.03.90	28.04.10	28.04.20
28.04.30	28.04.40	28.04.90	28.05.10	28.05.90	28.06.10
28.06.20	28.07.00	28.08.10	28.08.20	28.09.10	28.09.20
28.10.00	28.11.00	28.12.00	28.13.10	28.13.90	28.14.00
28.15.00	28.16.10	28.16.20	28.17.10	28.17.20	28.17.30
28.18.00	28.19.10	28.19.29	28.19.30	28.20.10	28.20.20
28.21.00	28.22.00	28.23.00	28.24.00	28.25.00	28.26.00
28.27.10	28.27.90	28.28.00	28.29.00	28.30.10	28.30.20
28.30.90	28.31.10	28.31.90	28.32.00	28.33.00	28.34.00
28.39.00	28.36.00	28.37.10	28.37.90	28.38.10	28.38.20
28.38.30	28.38.40	28.38.50	28.38.90	28.39.10	28.39.90
28.40.00	28.41.10	28.41.90	28.42.10	28.42.20	28.42.90
28.43.10	28.43.90	28.44.00	28.45.10	28.45.90	28.46.00
28.47.10	28.47.20	28.47.90	28.48.00	28.49.00	28.50.10
28.50.90	28.51.00	28.52.00	28.53.00	28.54.10	28.54.90
28.55.00	28.56.10	28.56.20	28.56.90	28.57.00	28.58.00
29.01.10	29.01.19	29.01.20	29.01.30	29.01.40	29.01.50
29.01.60	29.01.90	29.02.10	29.02.90	29.03.10	29.03.20
29.04.10	29.04.90	29.05.10	29.05.90	29.06.00	29.07.00
29.08.10	29.08.90	29.09.00	29.10.00	29.11.10	29.11.20
29.11.90	29.12.00	29.15.20	29.13.30	29.13.90	29.14.10
29.14.20	29.14.90	29.15.10	29.15.90	29.16.00	29.17.00
29.18.00	29.19.00	29.20.00	29.21.00	29.22.00	29.23.10
29.23.90	29.24.00	29.25.10	29.25.90	29.26.10	29.26.90
29.27.00	29.28.00	29.29.00	29.30.10	29.30.90	29.31.00
29.32.00	29.33.00	29.34.10	29.34.90	29.35.10	29.35.90
29.36.00	29.37.00	29.38.00	29.39.90	29.40.00	29.41.00
29.42.10	29.42.90	29.43.00	29.44.00	29.34.00	
30.01.00	30.02.10	30.02.90	30.03.10	30.03.20	30.03.30
30.03.40	30.03.50	30.03.60	30.05.10	30.05.20	30.05.30
30.05.90	31.05.90	32.01.10	32.01.90	32.02.00	32.03.00
32.04.00	32.05.10	32.05.20	32.05.30	32.05.40	32.06.00
32.07.10	32.07.20	32.07.90	32.08.00	32.09.10	32.09.20
32.09.30	32.09.40	32.09.50	32.09.60	32.10.00	32.11.00
32.12.00	33.01.10	33.10.20	33.01.30	33.01.40	33.01.50
33.01.60	33.01.90	33.02.00	33.03.00	33.04.00	33.05.00
34.02.10	34.02.90	34.03.00	34.04.00	35.01.00	35.02.10
35.02.90	35.03.10	35.03.90	35.04.00	35.05.00	35.06.10
35.06.20	36.01.00	36.02.10	36.02.90	36.03.00	36.05.10
36.04.20	37.01.10	37.01.90	38.01.00	38.02.00	38.03.00
38.04.00	38.05.00	38.06.00	38.07.10	38.07.90	38.08.00
38.09.10	38.09.20	38.09.90	38.10.00	38.12.00	38.13.10
38.13.90	38.14.10	38.14.90	38.15.10	38.15.90	38.16.10
38.16.90	38.17.00	38.18.10	38.18.20	38.19.10	38.19.20
38.19.90	39.01.10	39.01.19	39.01.30	39.01.39	39.02.10
39.02.19	39.02.30	39.02.40	39.02.42	39.02.44	39.02.46
39.02.49	39.03.10	39.03.15	39.03.19	39.04.00	39.15.10
39.05.19	39.05.30	39.05.39	39.06.10	39.06.16	39.06.19
39.06.30	39.06.39	39.07.10	39.07.20	39.07.22	39.07.90
40.01.10	40.01.15	40.01.20	40.01.30	40.01.32	40.01.34
40.01.36	40.01.39	40.01.50	40.01.60	40.01.90	40.02.00
40.03.00	40.04.00	40.05.00	40.06.10	40.06.20	40.07.00
40.10.10	40.10.90	40.14.10	40.15.00	40.16.10	40.16.90
43.03.10	43.04.10	45.01.00	45.02.00	45.03.10	45.03.20
45.03.30	45.03.90	45.04.10	45.04.20	45.04.30	45.04.40
45.04.90	47.01.10	47.01.20	47.01.24	47.01.30	47.01.34
47.01.36	47.01.40	47.01.90	47.02.10	48.01.10	48.01.40
48.01.42	48.01.50	48.01.55	48.01.59	48.01.83	48.05.00
48.07.10	48.07.30	48.07.45	48.07.49	48.07.50	48.08.00
48.15.60	48.15.90	48.20.00	48.21.10	48.21.20	48.21.30
48.21.39	49.01.10	49.01.90	49.02.00	49.03.00	49.04.00
49.05.00	49.06.00	49.08.10	49.11.10		
50.01.00	50.02.00	50.03.00	50.04.00	50.05.00	50.06.00
50.07.00	50.08.00	51.01.10	51.01.13	51.01.16	51.01.19
51.01.20	51.01.23	51.01.30	51.01.40	51.01.43	51.01.46
51.01.49	51.01.50	51.01.59	51.01.90	51.02.10	51.02.20
51.04.10	51.04.12	53.01.10	53.01.90	53.02.10	53.02.19
53.02.30	53.02.39	53.03.00	53.04.00	53.05.10	53.05.90
53.06.00	53.07.00	53.08.00	53.09.00	54.01.00	54.02.00
54.03.00	55.03.00	55.04.10	55.04.90	55.05.10	55.05.20
55.05.30	55.05.40	55.05.50	55.05.60	56.01.10	56.01.20
56.01.30	56.01.39	56.01.40	56.01.49	56.02.10	56.02.20
56.02.30	56.02.39	56.02.40	56.02.49	56.03.00	56.04.10
56.04.20	56.04.30	56.04.40	56.04.49	56.05.10	56.05.20
56.05.30	56.05.40	56.05.49	57.01.00	57.02.00	57.03.10
57.03.90	57.04.10	57.04.20	57.04.90	57.05.10	57.06.10
57.07.10	57.08.00	57.10.10	58.05.10	58.05.50	58.05.59
58.05.60	58.05.65	58.05.85	59.01.90	59.02.10	59.02.20
59.02.29	59.03.00	59.04.10	59.04.20	59.04.90	59.05.10
59.05.90	59.06.10	59.06.90	59.07.00	59.11.10	59.12.10
59.12.90	59.15.90	59.16.00	59.17.10	59.17.90	
62.03.10	62.03.20	65.06.10	65.06.20	68.01.00	68.04.00
68.05.00	68.06.10	68.06.20	68.06.90	68.07.00	68.08.00
68.09.00	68.10.10	68.11.20	68.12.10	68.13.10	68.13.20
68.13.30	68.13.40	68.13.90	68.14.00	68.15.10	68.16.10
68.16.20	69.01.00	69.02.00	69.03.00	69.09.10	69.09.20
69.09.29					
70.01.00	70.02.00	70.03.10	70.03.90	70.04.10	70.04.20
70.04.30	70.04.40	70.04.49	70.04.90	70.05.10	70.05.20
70.06.10	70.06.90	70.07.20	70.10.10	70.10.49	70.11.10
70.11.20	70.11.90	70.12.00	70.14.10	70.15.10	70.17.10
70.17.29	70.17.40	70.17.90	70.18.19	70.18.30	70.19.10
70.20.10	70.20.20	70.21.10	71.02.10	71.02.20	71.02.30
71.02.40	71.02.50	71.02.90	71.04.00	71.07.10	71.07.20
71.08.00	71.09.10	71.10.00	71.11.10	71.11.90	71.14.10
73.01.10	73.01.90	73.02.10	73.02.90	73.03.00	73.04.00
73.05.10	73.05.20	73.06.10	73.06.20	73.07.00	73.08.00
73.09.00	73.10.10	73.10.25	73.10.55	73.10.59	73.10.70
73.10.79	73.11.10	73.11.15	73.11.20	73.11.25	73.11.30
73.12.00	73.13.10	73.13.19	73.13.22	73.13.24	73.13.29
73.13.35	73.13.39	73.13.42	73.13.44	73.13.49	73.13.55
73.13.60	73.13.62	73.13.64	73.13.66	73.13.69	73.14.10
73.14.40	73.14.50	73.14.90	73.15.10	73.15.12	73.15.14
73.15.16	73.15.18	73.15.20	73.15.22	73.15.24	73.15.26
73.15.28	73.15.30	73.15.32	73.15.34	73.15.36	73.15.42
73.15.44	73.15.46	73.15.48	73.15.50	73.15.52	73.15.54
73.15.56	73.15.58	73.15.60	73.15.62	73.15.64	73.15.66
73.15.68	73.15.70	73.15.72	73.15.74	73.15.76	73.15.78
73.15.80	73.16.10	73.16.90	73.17.90	73.18.50	73.18.55
73.19.00	73.20.10	73.20.20	73.20.90	73.21.20	73.21.30
73.21.40	73.23.10	73.23.20	73.23.30	73.23.90	73.24.00
73.25.00	73.27.10	73.28.00	73.29.10	73.29.19	73.30.00
73.31.10	73.31.20	73.31.30	73.31.40	73.31.90	73.32.10
73.32.20	73.32.30	73.32.39	73.32.50	73.32.60	73.32.70
73.32.79	73.33.00	73.35.10	73.35.20	73.35.90	73.37.00
73.40.10	73.40.20	73.40.30	73.40.40	73.40.49	73.40.90
74.01.10	74.01.20	74.01.30	74.01.40	74.02.00	74.03.10
74.03.90	74.04.10	74.04.90	74.05.00	74.06.00	74.07.00
74.08.00	74.09.00	74.10.00	74.11.90	74.12.00	74.14.00
74.15.00	74.16.00	74.19.10	74.19.20	75.01.10	75.01.20
75.01.30	75.02.10	75.02.90	75.03.10	75.03.90	75.04.00
75.05.00	76.01.10	76.01.20	76.02.19	76.02.30	76.02.90
76.04.10	76.04.20	76.04.30	76.04.90	76.05.00	76.06.00
76.07.00	76.09.00	76.10.00	76.11.00	76.12.00	76.15.10
76.14.00	76.16.10	76.16.90	77.01.10	77.01.20	77.02.00
77.03.00	77.04.00	78.01.10	78.01.20	78.02.10	78.02.20
78.02.90	78.03.10	78.03.90	78.04.10	78.04.20	78.04.30
78.05.00	78.06.10	78.06.20	78.06.30	79.01.10	79.01.20
79.02.10	79.02.20	79.02.90	79.03.10	79.03.20	79.03.29
79.03.40	79.04.00	79.06.10	79.06.20	79.06.30	79.06.40
80.01.10	80.01.20	80.02.10	80.02.20	80.02.90	80.03.10
80.03.90	80.04.10	80.04.20	80.05.00	80.06.10	81.01.10
81.01.90	81.02.00	81.03.00	81.04.10	81.04.90	82.01.20
82.01.30	82.01.40	82.01.50	82.01.90	82.02.10	82.02.19
82.02.30	82.03.00	82.04.90	82.05.00	82.06.10	82.06.90
82.07.00	82.09.10	83.01.10	83.01.90	83.02.00	83.07.10
83.07.30	83.07.34	83.07.52	83.07.54	83.08.00	83.09.10
83.09.90	83.13.10	83.13.20	83.15.00	84.21.20	84.21.30
84.21.40	84.21.90	84.22.20	84.22.30	84.22.40	84.22.90
84.23.10	84.23.12	84.23.20	84.23.29	84.23.40	84.23.90
84.24.90	84.32.00	84.33.00	84.34.10	84.34.90	84.35.10
84.35.90	84.36.10	84.36.20	84.36.30	84.36.40	84.37.20
84.37.30	84.37.90	84.38.00	84.39.00	87.01.10	87.01.19
87.01.30	87.01.39	87.01.50	87.01.59	87.10.10	87.10.20
87.10.29	87.11.00				

Inquiries: OTAR 01-248 5757 ext. 469/465/401.

Kuwait

Medicines and drugs. The commercial department of the British embassy at Kuwait has been informed by the Ministry of Public Health that it is considering the introduction of a new system for the registration of drugs and medicines.

This notice is to alert British exporters to the fact that drugs already registered must be re-registered under the new system and that re-registering is expected to take place within the next six months.

Inquiries: OTAR 01-248 5757 ext. 475/7062.

New Zealand

Labelling of dangerous goods. The New Zealand government has issued the Dangerous Goods (Labelling) Regulations 1978 which came into force on 14 December 1978.

United Kingdom exporters can obtain a copy of these regulations from OTAR 01-248 5757 ext. 401/468/469.

Nigeria

Pre-shipment inspection. Following the notice in *Trade and Industry*, 22 December 1978, page 640, it has been announced in the *New Nigerian* that the following exemptions from pre-shipment inspection have been made:

1 Goods covered by established irrevocable letters of credit, acceptable to the Central Bank of Nigeria, opened on or before 12 December 1978; and

2 Goods shipped by sea if the carrying vessels depart from the port of loading on or before 31 January and, where shipment is by any other means, the goods arrive in Nigeria on or before 31 January.

For 1 a form M has to be submitted to the Central Bank (via an authorised dealer) by 26 January 1979. The form should be accompanied with supporting documentation including a photocopy of the letter of credit and clear specifications of the quantity and value of the goods.

A form M for goods other than those shipped under a letter of credit should be submit-

ted to the Central Bank, together with relevant documentation, by 15 January 1979.

Inquiries: CRE 01-215 3064.

Portugal

Safety glass and stop-watches. Portuguese *Diario da Republica*, 1st series, 273, 27 November 1978, published decree-law 358/78, where the following goods are added to annex A of decree-law 352/73 of 13 July 1973:

70.08 Safety glass consisting of toughened or laminated glass, shaped or not,
91.01.08 Stop-watches.

These goods are exempt from import duty when imported by Portuguese manufacturers in the electronics sector for exclusive use in their production cycle and provided the articles in which they are incorporated can comply with the rules which allow them to be treated as products of Portuguese origin.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Saudi Arabia

Sponsorship and foreign workers. There has been considerable publicity in recent months about the tightening up of sponsorship laws in general and works permits in particular for Saudi Arabia.

The role of a sponsor is a legal fundamental in Saudi Arabia: a foreign worker enters the country on his sponsor's personal guarantee, and consequently the sponsor is held by law to be responsible for that foreigner's actions, including crimes committed, debts incurred and injuries to other persons.

Over the years, for various reasons, large numbers of unsponsored foreign workers had accumulated in the kingdom, and the recent campaign was intended to restore the required legal situation.

Transfer of sponsorship. Now that every foreign worker should have a sponsor, his sponsorship can be freely transferred from one Saudi sponsor to another. The worker must continue in the same kind of work, and he can start with his new sponsor as soon as the transfer has been agreed and the application has been filed with the passports department.

Recruitment agencies. Transfers of sponsorship will allow a certain mobility of workers. However a serious overall lack of unskilled and semi-skilled labour has arisen as a result of sponsorship enforcement, since most 'illegal' workmen fell into those categories.

Permission has therefore been given for the creation of recruitment agencies, and the Ministry of Labour has invited registration applications for such agencies, which must be under the proprietorship of a Saudi national. Although these offices are expected to engage in some manpower recruitment for other companies, their principal purpose will be to create a reservoir of legally resident workers to cover the short-term requirements of other companies.

Such workers will enter the country under the recruitment agencies' sponsorship.

Workers 'loaned out' will need written permission to work for others and will at all times remain the recruitment agencies' responsibility in civil and criminal law.

Inquiries: CRE 01-215 5221.

Spain

Phenol. The Spanish *State Gazette*, 23 December 1978, published royal decree 3009 of 15 December 1978 modifying tariff heading 20.06 AI as follows:

CCCN/Description	Import duty
29.06 AI Phenol and its salts	22%

Home compensation tax and licensing position remain unchanged.

Inquiries: OTAR 01-248 5757 ext. 461/458/459/460.

Organic acids. The Spanish *State Gazette*, 11 December 1978, published royal decree 2858/78 of the Ministry of Commerce, introducing a new sub-section to CCCN 29.14 as follows:

CCCN/Description	Import duty
29.14 A7 Caproic, caprilic, capric, lauric, miristic and palmitic acids, their salts and esters	20%

The former sub-section 29.14 A7 becomes 29.14 A8.

Inquiries: OTAR 01-248 5757 ext. 461/458/459/460.

Thailand

Alcoholic beverages. The Thai government has issued the Liquor Act (No. 5) B.E.2521 (1978) and ministerial regulations 68 (B.E.2521-AD1978) which came into force on 1 November 1978.

The Liquor Act puts a liquor tax on imported liquor of:

Baht

Description	Duty
a 1 litre of fermented liquor	50
b 1 litre of distilled liquor of pure alcohol analysed with the device of the Excise Department or that recognised by the Excise Department	200

Regulation 68 deals with the liquor stamp to be placed on imported liquor beverages; its design; colour; wording; and the various fees.

UK exporters can obtain copies of these rules from OTAR 01-248 5757 ext. 401/468/469.

United States

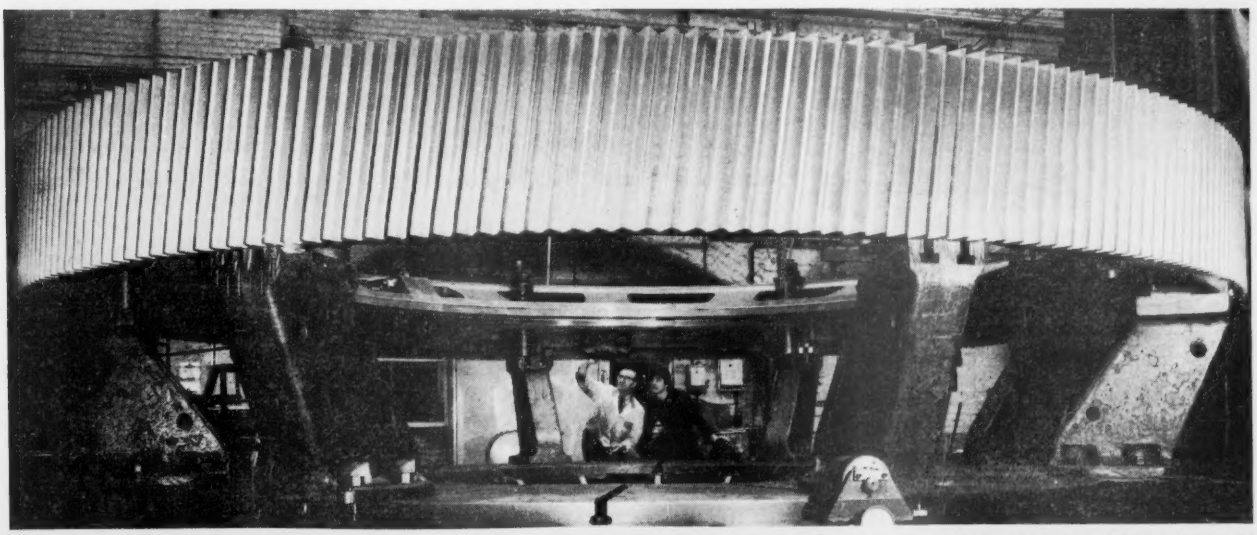
Speciality steel. All speciality steel quota's for the EEC were filled at the opening on 14 December 1978 with the exception of the quota for plates of stainless steel, item 923.21.

Inquiries: CRE 01-215 5397.

Flotation materials. The *Federal Register*, 4 December 1978, published a final rule, by the Department of Transportation, which amends the Coast Guard flotation standard establishing performance specifications for flotation materials used in small monohull boats.

Inquiries: CRE 01-215 5629.

Part of four David Brown's sugar mill gear transmissions for a mill near Kamalia in the Punjab region of Pakistan. Completion date is schedules for November 1979.



Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
				of which			of which					
			Total	Manufacturing industry	Distributive and service industries excl. shipping	Total	Manufacturing industry	Wholesalers [1]	Retailers [1]	Current balance	Visible balance	Invisible balance
	at 1975 prices		at 1975 prices			at 1975 prices				at current prices		
Base of index Series in Stock level at end-1977	1975	£ million	£ million			£ million 34,469	20,261	4,540	3,181	£ million		
1971	94.5	59 340	20 208	3 923	3 888	235	−277	218	12	1 090	261	829
1972	96.7	62 762	20 239	3 398	4 055	73	−279	173	29	135	−722	857
1973	103.4	65 497	21 609	3 504	4 674	2 983	1 336	432	624	−999	−2 383	1 384
1974	101.5	64 070	21 164	3 822	4 605	1 462	1 288	361	−180	−3 591	−5 235	1 644
1975	100.0	63 192	20 817	3 522	3 841	−1 925	−1 221	−249	−100	−1 855	−3 236	1 381
1976	102.9	63 320	20 489	3 345	3 926	261	316	131	13	−1 137	−3 589	2 452
1977	104.9	62 732	19 738	3 573	4 325	1 051	442	266	29	406	−1 709	2 115
1976 2nd qtr	102.7	15 785	5 137	828	972	−17	−29	−10	−67	−315	−949	636
3rd qtr	103.3	15 884	5 168	849	1 005	189	99	81	46	−417	−1 132	715
4th qtr	104.1	15 927	4 997	856	1 014	214	260	17	27	−326	−958	632
1977 1st qtr	103.8	15 619	4 794	851	1 030	442	235	82	117	−480	−973	493
2nd qtr	104.8	15 495	5 025	879	1 044	354	97	179	4	−280	−762	482
3rd qtr	105.1	15 777	4 965	910	1 103	6	−6	−80	−59	575	31	544
4th qtr	105.9	15 841	4 954	932	1 149	249	116	85	−33	591	−5	512
1978 1st qtr	105.5	16 311	5 030	920	1 169	291	38	81	62	−413	−642	229
2nd qtr	107.9	16 370	5 039	960	1 180	405	272	−62	128	126	−182	308
3rd qtr	108.8	16 810	4 990	968	1 159		162	38	54	−26	−342	316
% change last 2 qtrs on prev. 2 qtrs.	+2.5	+3.2	+0.5	+4.1	+0.9							
on a year earlier	+3.2	+6.1	+0.4	+7.8	+8.9							

	Industrial production		Personal expenditure		Prices and earnings					Labour (UK)			Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices		Wholesale prices: all manufacturing industry		Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults	Export	Import
				monthly averages		% increase on a year earlier	basic materials and fuel used	manufactured products: home sales		mid-month count	% of total employees	mid-month count	On a balance of payment basis	
	at 1975 prices		at 1971 prices		(not seasonally adjusted)				(old series)				at 1975 prices	
Base of index £m in base year Series in	1975	1975	1971 16,296	thousands	Jan. 1974		1975	1975	Jan. 1970	thousands		thousands	1975 19,463	1975 22,699
1973	109.5	108.4	110.3	137.1	93.5	9.1	55.8	66.6	152.1	611.0	2.6	307.0	97.8	108.7
1974	105.1	106.5	109.0	102.8	108.5	16.0	86.3	81.9	179.1	599.7[1]	2.6[1]	302.7[1]	104.3	109.7
1975	100.0	100.0	106.7	97.2	134.8	24.2	100.0	100.0	226.6	929.0	3.9	150.0[1]	100.0	100.0
1976	102.0	101.4	106.5	104.7	157.1	16.5	127.0	117.3	261.9	1 269.8[1]	5.4[1]	120.4[1]	109.8	105.7
1977	105.8	102.9	103.6	107.1	182.0	15.8	145.6	140.6	288.5	1 378.1	5.8	155.6[1]	118.9	107.0
1978							144.6 p	153.3 p						
1977 1st qtr	105.5	103.9	103.3	104	174.1	16.5	144.8	133.0	280.0	1 329.5	5.6	..	115.8	109.4
2nd qtr	105.6	102.5	102.5	103	181.9	17.4	148.8	139.6	285.3	1 340.6	5.6	157.7	118.0	109.6
3rd qtr	106.2	103.1	104.3	112	184.7	16.5	146.5	143.8	288.3	1 414.6	5.9	151.9	124.4	106.6
4th qtr	105.8	102.0	104.4	110	187.4	13.1	142.2	145.8	300.4	1 427.8	6.0	160.1	117.6	102.7
1978 1st qtr	107.1	102.5	106.3	129	190.6	9.5	140.2	149.2	310.8	1 409.4	5.9	187.7	119.5	114.1
2nd qtr	111.2	105.1	108.0	130	195.8	7.7	146.3	151.8	329.0	1 372.7	5.7	210.3	122.0	110.3
3rd qtr	111.0	105.2	110.9	132	199.2	7.8	144.9	154.8	334.6	1 380.5 p	5.8	213.0	125.3	116.1
4th qtr							147.0 p	157.3 p		1 339.7 p	5.6	230.3		
1978 Jan	106.8	102.3	104.9	125	189.5	9.9	139.4	148.3	306.3	1 419.2	5.9	180.3	111.2	114.4
Feb	107.4	102.2	106.8	120	190.6	9.5	139.1	149.2	311.2	1 409.0	5.9	187.0	127.0	111.1
Mar	107.1	102.9	107.0	142	191.8	9.1	142.0	150.0	314.8	1 400.0	5.9	195.8	120.4	116.7
Apr	111.5	105.7	106.7	132	194.6	7.9	145.1	150.9	325.7	1 387.1	5.8	203.7	125.6	104.4
May	110.2	103.8	108.4	124	195.7	7.7	146.8	151.9	327.2	1 366.4	5.7	209.9	119.0	114.7
Jun	111.8	105.9	108.7	133	197.2	7.4	147.0	152.7	334.0	1 364.7	5.7	217.4	121.4	111.8
Jul	111.3	105.3	111.4	108	198.1	7.8	145.8	153.8	332.7	1 371.4	5.7	211.0	126.3	116.1
Aug	111.4	105.6	111.8	146	199.4	8.0	144.2	154.8	333.2	1 392.1	5.8	209.3	124.4	111.3
Sep	110.4	104.5	109.5	144	200.2	7.8	144.8	155.7	338.0	1 378.3	5.8	218.7	125.1	120.8
Oct	109.3 p	103.3 p	109.6	131	201.1	7.8	145.7	156.6	344. p	1 359.6	5.7	228.4	127.4	111.9
Nov			109.9	117	202.5	8.1	147.3 p	157.1 p		1 338.8	5.6	231.3	124.5	120.3
Dec							148.0 p	158.3 p		1 320.7 p	5.5	231.2		
% change latest 3 months														
on prev. 3 months	−0.7	−0.5	−0.7	+1.3	+1.5		+1.4	+1.7	+2.2	−3.0		+8.1	+1½	+4
on a year earlier	+4.0	+1.8	+6.4	+18.4	+7.9		+3.4	+7.9	+16.1	−6.2		+43.8	+4½	+15

p Provisional e Estimate [1] Average of available months

Inquiries: 01-215 3453

Retail sales in November

Volume

The final seasonally adjusted index of the volume of retail sales in November is 109.9 (1971 = 100), close to the provisional estimate of 109½ (announced on 11 December 1978).

It indicates that trade has continued at broadly the same level for the last three months. It is below the high level of sales in July and August, but above that of earlier months of the year.

In the three months September to November the volume of sales was 1 per cent lower than in the previous three months when trade appeared to be boosted by income tax changes. The average level of trade in the first 11 months of 1978 was about 5 per cent above the annual average for 1977.

The volume of sales by durable goods shops in the three months September to November was 2 per cent lower than in the previous three months. Sales by clothing and footwear shops and by 'other non-food' shops, which include department stores and mail-order businesses, both fell by 1 per cent. Sales by food shops were little changed between these periods.

Value

Based on non-seasonally adjusted data, the value of total retail sales in November was 13 per cent higher than in November 1977. In the first 11 months of 1978, the average value of sales was 14 per cent higher than in the corresponding period of 1977.

Inquiries: Department of Trade, Economics and Statistics Division 6c, Room 351, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3705.

Notes

The indices for all shops, food shops, and total non-food shops are shown to the first decimal place to help interpretation, but should not be regarded as necessarily accurate to the final digit. The best indication of the recent trend is normally obtained by comparing the average index for the latest three months with the average for the immediately preceding three months, but month-to-month fluctuations may sometimes make it preferable to average two months or four months.

When using the volume figures, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus, the relative accuracy with which volume changes have been measured is likely to have been reduced in recent periods.

The monthly periods consist of four weeks except those marked [1] which are of five weeks. The November 1978 sales period was the four weeks from 29 October 1978 to 25 November 1978. The corresponding period in 1977 was the four weeks from 30 October 1977 to 26 November 1977.

The value estimates are compiled inclusive of VAT, and will, therefore, reflect changes in the rates of VAT. The volume estimates, however, are not affected by these changes since the retail price indices used to 'deflate' the value data are themselves inclusive of VAT.

Within the total, sales are analysed by 'kinds of business'; ie the statistics are of sales by particular kinds of shop rather than of sales of particular commodities. For example, while sales by shops classified as food shops are mainly of food, many of them also sell other goods. Similarly, some food is sold by shops classified to other kinds of business.

The seasonally adjusted series include, where appropriate, adjustments for the timing of holidays and adjustments to make allowance for the inclusion of an extra week in the January 1975 trading period. No adjustments are made to the non-seasonally adjusted data.

Studies in official statistics no. 31

Regional accounts

This booklet, prepared by the Central Statistical Office, describes the data sources and methods used in estimating gross domestic product, personal incomes and components of final expenditure for Scotland, Wales, Northern Ireland and the eight economic planning regions of England. A continental shelf region is also distinguished; this includes the profits of the UK offshore oil and gas activity. Certain of the estimates are further subdivided within the south-east region to distinguish the Greater London area.

The booklet provides an essential background for regional economists and others concerned with the interpretation of the published data in the regional accounts. The concepts adopted for the individual items within the accounts and the limitations of the data and methods used to produce the estimates are fully discussed.

Price £1.75 net (£1.90 by post). ISBN 0 11 630161 9

The article giving the provisional estimate of the seasonally adjusted index of the volume of retail sales for December and the increase in value of sales compared with a year earlier will be published later this month.

Table 1 Volume of retail sales seasonally adjusted

Index numbers of sales per week (average 1971 prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16 296)	Food shops (6 866)	Non-food shops Total (9 430)	Clothing and footwear shops (2 436)	Durable goods shops (1 897)	Other non-food shops [2] (5 097)
1971	100.0	100.0	100.0	100	100	100
1972	105.3	101.6	107.9	104	113	108
1973	110.3	101.6	116.6	108	127	117
1974	109.0	102.4	113.8	106	122	115
1975	106.7	100.0	111.5	106	119	111
1976	106.5	98.7	112.1	106	122	111
1977	103.6	94.8	110.0	105	119	109
1977						
1st qtr	103.3	94.9	109.3	105	116	109
2nd	102.5	94.7	108.2	101	118	108
3rd	104.3	94.4	111.5	107	121	110
4th	104.4	95.3	111.1	109	121	109
1978						
1st qtr	106.3	96.6	113.3	110	125	111
2nd	108.0	98.1	115.2	110	129	112
3rd	110.8	98.1	120.1	117	135	116
1977						
November	103.1	93.9	109.8	107	118	108
December [1]	106.9	97.3	113.9	114	125	110
1978						
January	104.9	95.1	112.0	105	129	109
February	106.8	96.8	114.1	109	130	111
March [1]	107.0	97.6	113.8	115	117	112
April	106.7	96.5	114.2	108	132	111
May	108.4	98.9	115.4	113	126	112
June [1]	108.7	98.7	116.0	110	130	113
July	111.4	98.4	120.9	116	138	117
August	111.8	97.9	121.9	121	134	118
September [1]	109.5	97.9	118.0	115	133	114
October	109.6	97.9	118.2	114	131	115
November	109.9	98.4	118.3	115	129	116
1978						
June-August	110.5	98.4	119.3	115	134	116
1978						
September-November	109.7	98.1	118.2	115	131	115
Percentage increase	−0.7	−0.3	−0.9	−1	−2	−1

[1] Five-week period.
[2] Including department stores and mail-order businesses.

Table 2 Value of retail sales seasonally adjusted

Index numbers of value of sales per week (current prices) 1971 = 100

(Sales in 1971 – £ million Final estimates)	All kinds of business (16 296)	Food shops (6 866)	Non-food shops Total (9 430)	Clothing and footwear shops (2 436)	Durable goods shops (1 897)	Other non-food shops [2] (5 097)
1971	100.0	100.0	100.0	100	100	100
1972	112.0	109.0	114.2	112	118	114
1973	126.9	123.0	129.8	128	136	128
1974	146.7	144.9	148.1	148	144	149
1975	174.4	175.0	174.0	171	168	178
1976	200.1	204.8	196.7	189	187	204
1977	228.0	234.7	223.1	216	206	233
1977						
1st qtr	216.4	223.8	211.0	204	192	222
2nd	222.0	230.4	215.8	204	202	227
3rd	234.2	239.4	230.4	224	213	240
4th	239.4	245.3	235.1	231	219	243
1978						
1st qtr	246.0	249.5	243.5	237	228	252
2nd	254.5	258.6	251.5	243	243	258
3rd	267.5	266.9	267.9	266	254	274
1977						
November	236.3	242.3	231.9	228	213	241
December [1]	246.0	250.6	242.7	244	227	248
1978						
January	241.0	245.0	238.0	223	233	247
February	246.5	249.4	244.4	235	237	252
March [1]	249.8	253.2	247.3	250	217	257
April	250.3	252.3	248.9	235	250	255
May	255.2	260.0	251.6	250	236	258
June [1]	257.3	262.5	253.5	245	244	261
July	265.8	265.6	266.0	261	257	272
August	270.3	266.7	272.9	275	253	279
September [1]	266.6	268.0	265.5	262	253	272
October	267.2	267.9	266.7	260	249	277
November	269.1	270.7	268.0	262	248	278
1978						
June-August	263.9	264.7	263.3	259	251	270
1978						
September-November	267.6	268.8	266.6	262	250	275
Percentage increase	1.4	1.5	1.3	1	–	2

[1] Five-week period.
[2] Including department stores and mail-order businesses.

Hire purchase and other instalment credit business in November

Finance houses and retailers advanced £505 million of new instalment credit in November, after allowing for seasonal factors. Lending by finance houses was higher than in recent months. Lending by retailers was higher than in October but similar to that in each of the preceding three months.

Total advances in the latest three months, September to November, were 3 per cent higher than in the previous three months. Lending by finance houses increased by 5 per cent between the two three-month periods. Lending by retailers increased by 1 per cent.

The average weekly value of instalment credit sales by retailers in November was higher than in October. In the latest three months, September to November, average sales were 2 per cent higher than in the previous three months. Within this total, sales by durable goods shops decreased by 3 per cent, sales by department stores (including those by Co-operative Societies) were unchanged and sales by other instalment credit retailers (mainly mail-order business) increased by 4 per cent.

The debt outstanding to finance houses and retailers increased by £74 million in November, bringing the total increase in the three months September to November to £206 million, compared to £256 million in June to August. Amounts outstanding to finance houses increased by £170 million and those to retailers by £36 million during the latest three-month period. At the end of November, the total amount outstanding to finance houses and retailers was £4,238 million (*not* seasonally adjusted), 30 per cent more than a year earlier.

Inquiries: Department of Trade, Economics and Statistics Division 6a, Room 349, Sanctuary Buildings, 20 Great Smith Street, London SW1P 3DB, tel. 01-215 3162.

Table 1 *Hire purchase and other* instalment credit business seasonally adjusted

£ million

	Total		Finance houses[1]		Retailers[2]	
	New credit extended	*Change in debt*	*New credit extended*	*Change in debt*	*New credit extended*	*Change in debt*
1971	2 036	251	990	165	1 046	86
1972	2 466	438	1 222	296	1 244	142
1973	2 846	444	1 453	332	1 393	112
1974	2 508	−164	1 037	−160	1 471	−4
1975	2 981	−13	1 201	−55	1 780	42
1976	3 586	343	1 535	202	2 051	141
1977	4 392	625	2 072	500	2 320	125
1976						
4th qtr	968	127	421	83	547	44
1977						
1st qtr	1 007	144	457	89	550	55
2nd	1 047	136	486	118	561	18
3rd	1 149	186	544	148	605	38
4th	1 189	159	585	145	604	14
1978						
1st qtr	1 260	245	626	182	634	63
2nd	1 393	281	716	227	677	54
3rd	1 427	223	701	167	726	56
1977						
December	410	61	208	61	202	—
1978						
January	429	85	213	62	216	23
February	418	82	201	57	217	25
March	413	78	212	63	201	15
April	463	93	231	66	232	27
May	471	82	243	74	228	8
June	459	106	242	87	217	19
July	458	53	213	40	245	13
August	493	97	252	71	241	26
September	476	73	236	56	240	17
October	469	59	242	48	227	11
November	505	74	262	66	243	8
1978						
Jun-Aug	1 410	256	707	198	703	58
Sep-Nov	1 450	206	740	170	710	36
Percentage increase	3		5		1	

[1] Direct business only: ie excluding agreements block discounted with finance houses by retailers. [2] Durable goods shops, department stores and 'other instalment credit retailers'. For further definitions see footnotes to table 2.

Table 2 Retailers' instalment credit sales seasonally adjusted

Index numbers of value of sales per week (current prices)

1971 = 100

	Total[1]	*Durable goods shops*	*Department stores*	*Other instalment credit retailers[2]*
(HP and other instalment credit sales in 1971 £ million[3])	(1130)	(370)	(139)	(621)
1971	100	100	100	100
1972	117	117	106	120
1973	132	119	119	143
1974	139	94	122	169
1975	165	115	143	200
1976	190	136	162	229
1977	217	142	171	272
1976				
4th	*200*	*138*	*166*	*244*
1977				
1st qtr	205	135	166	256
2nd	210	136	153	266
3rd	227	148	179	284
4th	227	148	184	283
1978				
1st qtr	237	167	183	291
2nd	*254*	*172*	*199*	*315*
3rd	272	174	219	342
1977				
December [4]	228	155	183	281
1978				
January	*243*	*180*	*187*	*293*
February	244	166	189	302
March [4]	228	157	175	281
April	*262*	*185*	*178*	*326*
May	256	168	196	321
June [4]	246	165	217	300
July	*275*	*178*	*231*	*343*
August	271	174	204	344
September [4]	270	171	221	340
October	258	163	205	327
November	275	166	227	349
1978				
Jun-Aug av.	263	172	217	327
Sep-Nov av.	268	167	218	339
Percentage increase	2	−3	–	4

[1] Durable good shops, department stores (including co-operative societies) and 'other instalment credit retailers'. [2] General stores (other than department stores) and general mail-order houses. [3] Excluding sales against checks issued by other organisations. [4] The monthly periods for retailers consists of four weeks except those marked [4] which are of five weeks. The period covered by November 1978 sales was the four weeks from 29 October 1978 to 25 November 1978. The corresponding period in 1977 was from 30 October 1977 to 26 November 1977.

Wholesale price indices in December

Output prices

The provisional price index for the home sales of manufactured products increased by ¾ per cent in December to 158.3 (1975 = 100).

The index for manufactured products other than food, drink and tobacco was also ¾ per cent higher. Almost half of the increase was due to higher prices for vehicles and mechanical engineering products. This index rose by 1¾ per cent in the latest three months.

Higher prices for milk and milk products (see note) and, to a lesser extent, bread and flour confectionery, accounted for most of the 1½ per cent rise in December in the index for the output of the food manufacturing industries. This index rose by 2 per cent in the latest three months.

The change in the index for all manufactured products measured over a 12-month period increased from 7¾ to 8¼ per cent in December, the first increase since August. The increase in the index over the latest six months rose from 3½ to 3¾ per cent.

Input prices

The provisional price index for materials and fuel purchased by manufacturing industry increased by ½ per cent in December to 148.0 (*1975 = 100*). This index rose by 5 per cent over the last 12 months.

The index for materials purchased by manufacturing industry other than food, drink and tobacco industries fell by ¼ per cent in December. Lower sterling prices for crude oil, *resulting from the appreciation of sterling* against the dollar, made the most significant contribution. With crude oil excluded, the index showed no change, higher prices for mohair being offset by lower prices for a number of other commodities.

Higher prices for milk (see note) were mainly responsible for the 1½ per cent increase in the index for materials purchased by the food manufacturing industries.

Note

The wholesale price of milk rose in December although the increase in retail prices was implemented in November. This was an administrative arrangement to ensure the correct reimbursement to processors and distributors of milk in the period up to March 1979.

1975 = 100

	Oct	Nov p	Dec p
Output prices (home sales)			
All manufactured products	156.6	157.1	158.3
Products of manufacturing industry other than food, drink and tobacco industries	154.5	155.1	156.1
Products of the food manufacturing industries	164.7	164.9	167.5
Prices of materials and fuel purchased			
By manufacturing industry	145.7	147.3	148.0
materials	144.7	146.5	147.2
coal, gas and electricty	153.0	153.0	153.0
By manufacturing industry other than food, drink and tobacco industries	139.8	141.5	141.1
materials	137.3	139.3	138.8
By food manufacturing industries	159.0	160.3	162.8
materials	159.1	160.5	163.1

p Provisional.

Textiles and clothing trade balance deteriorates as retail sales soar

Home demand (table 1)
In the third quarter of 1978 the combination of earnings rising faster than prices and the receipt of tax rebates gave a boost to retail sales. Consumers' expenditure on clothing, which had reached a record level in the second quarter of 1978, showed a further 7 per cent rise. Although there are indications that the fourth quarter will be lower, clothing undoubtedly increased its share of consumer spending in 1978. The demand for household textiles was also buoyant, with a rise of 6 per cent in the third quarter. It is expected that the rate of increase in consumers' expenditure this year will be significantly lower than in 1978.

Output (table 2)
Output in the textile industry continued to improve in the third quarter of 1978. Although only 1 per cent higher than in the second quarter, it was 4 per cent above the very depressed first quarter. Despite the improvement it is clear from the figures available that output for 1978 as a whole was less than in 1977, and was markedly lower in the cotton system spinning and the cotton and man-made fibre weaving sectors.

In the third quarter cotton system spinning, woollen and worsted and carpets were all about 3 per cent higher than in the second quarter, but cotton and man-made fibre weaving showed a fall of 3 per cent.

Deliveries of made-up clothing in the third quarter, based on provisional figures, reached the highest level recorded. With the rapid growth of exports having tailed off this year, it is the strength of home demand which has led to the increase in output.

Wholesale prices (table 5)
The wholesale price index of materials and fuel purchased by the textile industries was only marginally higher in the third quarter of 1978 than in the second quarter. The price of both raw cotton and raw wool remained fairly stable after their sharp increases earlier in the year. However, in the fourth quarter the price of raw cotton resumed its upward trend which started a year previously.

Output prices in the textile industry as a whole rose by more than 2 per cent in the third quarter of 1978, a slightly greater rise than for all manufactured products. Of the selected products shown in the table it is noticeable that those belonging to the downstream sectors, socks, stockings and tights, carpets and made-up clothing, show above average increases.

Employment in textiles and clothing (table 6)
Total employment in textiles in Great Britain at mid-September 1978 was 3600 lower than in June 1978 and 18 000 lower than a year previously. Spinning and doubling on the cotton and flax systems and woollen and worsted between them accounted for the bulk of the drop between June and September. Man-made fibres was the only sector in which employment did not fall. Despite the higher level of

Table 1 **Comparison of textile and clothing output with some factors affecting demand**

Index numbers 1975 = 100 (quarterly figures seasonally adjusted)

	1973	1974	1975	1976	1977	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr	Growth rate per cent per annum 1973/77	Growth per cent 12 months ended Q3 1978/ Q3 1977
Gross domestic product at factor cost (expenditure based)	103.4	101.7	100.0	108.6	105.1	104.5	103.2	104.5	105.8	107.0	106.1	108.1	108.6	+0.4	+2.8
Consumer's expenditure															
All items	*103.6*	*101.4*	*100.0*	*100.2*	*99.3*	*100.8*	*98.9*	*98.1*	*99.9*	*100.3*	*103.2*	*103.6*	*106.4*	*−1.1*	*+4.0*
Clothing	99.6	98.4	100.0	100.8	103.2	101.9	101.9	100.5	104.9	105.4	107.7	109.3	116.5	+0.9	+7.3
Household textiles and soft furnishings	101.3	99.5	100.0	104.2	103.8	105.3	106.0	103.8	104.6	100.9	109.7	108.2	114.8	+0.6	+3.3
Output															
Total manufacturing	108.3	106.5	100.0	101.4	102.9	103.2	103.9	102.5	103.1	102.0	102.5	105.1	105.2	−1.2	+0.5
Textiles	117.1	105.9	100.0	103.0	101.0	105.6	105.4	99.9	100.5	98.0	97.1	99.8	100.9	−3.7	−3.8
Clothing [1]	*100.6*	*98.7*	*100.0*	*96.6*	*103.0*	*97.5*	*101.5*	*102.4*	*103.6*	*104.3*	*100.3*	*102.8*	*104.8*	*+0.6*	*+1.8*

[1] Includes gloves, hats, caps and millinery and is not comparable with previous series.

Table 2 **Output**

Index numbers 1975 = 100 (quarterly figures seasonally adjusted)

	1968 MLH	Weights	1973	1974	1975	1976	1977	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr	Growth rate per cent per annum 1973/77	Growth per cent 12 months ended Q3 1978/ Q3 1977
Man-made fibres	411	11.8	128.6	110.8	100.0	109.6	97.7	112.0	108.4	102.9	97.1	82.4	102.4	104.7	104.1	−6.6	−6.4
Spinning and doubling on cotton system [1]	412	9.4	122.7	109.6	100.0	105.5	100.2	108.0	108.5	97.8	98.1	96.5	90.3	91.2	93.9	−4.9	−9.8
Weaving of cotton and man-made fibres [2] (part)	413	8.3	118.1	104.9	100.0	99.1	97.5	98.6	100.5	97.8	98.5	93.2	90.7	94.4	91.8	−4.7	−6.4
Woollen and worsted	414	16.6	138.9	113.2	100.0	101.5	104.7	104.1	109.3	103.6	101.8	104.0	100.5	100.3	104.1	−6.8	−2.4
Hosiery and other knitted goods	417	19.6	104.9	102.8	100.0	105.5	105.9	108.7	107.0	103.8	107.5	105.3	103.8	102.9	102.6	+0.2	−2.9
Carpets	419	9.3	112.6	103.4	100.0	99.9	92.5	102.4	97.2	86.2	92.5	94.0	92.3	96.7	99.5	−4.8	+1.1
(Order XIII) [3]		100.0	117.1	105.9	100.0	103.0	101.0	105.6	105.4	99.9	100.5	98.0	97.1	99.8	100.9	−3.7	−3.8

[1] Including texturing of man-made continuous filament yarns. [2] Excludes linen. [3] In addition to sectors listed above includes jute, twine and net, lace, narrow fabrics, made-up textiles, textile finishing and other textiles industries. Their combined weight in the total index is 25.0 per cent.

Table 3 **Production of man-made fibres**

Million kg

	1971	1972	1973	1974	1975	1976	1977	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr	Growth rate per cent per annum 1971/77	Growth per cent 12 months ended Q3 1978/ Q3 1977
Staple fibre																	
Synthetic	166	177	221	196	178	214	182	57	53	51	42	36	55	62	52	+1.5	+1.0
Viscose and acetate	170	185	204	160	138	134	130	35	34	36	34	26	35	32	33	−4.4	−9.4
Total	336	362	425	356	316	348	312	92	87	87	76	62	90	94	85	−1.2	−3.2
Continuous filament yarn																	
Synthetic	191	196	233	200	185	200	177	50	49	48	41	39	45	47	42	−1.3	−8.0
Viscose and acetate	85	68	73	72	63	71	62	19	18	16	14	14	16	15	15	−5.1	−10.4
Total	276	264	306	272	248	271	239	89	67	64	55	53	61	62	57	−2.4	−15.3
All man-made fibres																	
Synthetic	357	373	454	396	363	414	359	107	102	99	83	75	100	109	94	+0.1	−3.3
Viscose and acetate	255	253	277	232	201	205	192	54	52	52	48	40	51	47	48	−4.6	−9.7
Total	612	626	731	628	564	619	551	161	154	151	131	115	151	156	142	−1.7	−5.5

output, employment in the clothing industry continued to decline.

Improvements in productivity will mean that any further increases in output of textiles and clothing need not be reflected by a corresponding rise in employment.

Overseas trade (tables 7-10)

After a fall in the second quarter of 1978 the crude trade deficit for clothing (div. 84) rose again in the third quarter. At £68 million it was well above the £27 million deficit of a year previously. Compared with the third quarter of 1977 exports showed an increase of 7 per cent in current value (6 per cent by weight) against a rise of 27 per cent in imports (23 per cent by weight). The EEC continued to receive nearly one half of UK exports and the proportion going to the rest of western Europe rose to 20 per cent. The Irish Republic, with 13 per cent of clothing exports remains the largest market, and the Federal Republic of Germany, Netherlands, France, Sweden and Norway each took between 5 and 10 per cent.

The crude trade balance in yarns and fabrics (div. 65) continued the downward trend which started in the third quarter of 1977, and in the third quarter of 1978 reached an adverse balance of £65 million. Imports increased by 30 per cent in current value compared to the third quarter of 1977; exports were 2 per cent higher. In 1978 home demand in the UK showed more buoyancy than in most other European countries, which has led to our competitors paying greater attention to the UK market. This is thought to have been a contributory factor in the large increase in imports from developed countries last year. The most encouraging export growth was in woollen and worsted fabrics, with increased sales to USA, Iran and Japan, and in continuous filament yarn, for which the Irish Republic became the main customer. Imports of man-made fibre woven fabrics recorded a substantial increase, with the EEC accounting for the bulk of the rise.

Inquiries: Department of Industry, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 6787.

Table 4 Consumption of fibres

Million kg

	1971	1972	1973	1974	1975	1976	1977	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr	Growth rate per cent per annum 1971/77	Growth per cent 12 months ended Q3 1978/ Q3 1977
In cotton spinning																	
Raw cotton	140	129	126	111	103	113	104	29	31	25	23	25	25	24	23	−4.8	−10.2
Man-made staple fibre																	
Rayon	34	32	36	39	30	27	30	7	9	8	6	7	6	7	7	−2.1	−10.0
Other	36	34	37	30	30	38	39	10	11	9	9	10	10	10	10	+1.3	+2.6
In top making, wool spinning and felting																	
Wool and animal hair	151	165	149	121	122	134	126	34	36	33	27	30	33	32	27	−3.0	−6.2
Man-made staple fibre	77	86	105	103	86	87	85	23	23	22	19	21	21	21	20	+1.7	−4.6

Table 5 Wholesale prices

Index numbers 1975 = 100

	1974	1975	1976	1977	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr
Output (home sales)												
All manufactured products	81.8	100.0	117.3	140.5	125.2	133.0	139.5	143.8	145.8	149.2	151.8	154.8
Textile industries	90.5	100.0	115.3	135.6	122.6	131.8	135.0	136.6	139.0	143.0	145.5	148.9
Man-made continuous filament yarn cloth in the loom state	86.0	100.0	109.1	124.0	114.2	119.4	123.8	125.8	127.2	129.0	132.1	133.0
Cotton cloth in the loom state	100.3	100.0	117.6	140.1	130.3	136.9	142.4	141.8	139.5	139.7	142.3	144.5
Worsted cloth	96.8	100.0	119.2	141.9	132.0	139.2	141.5	142.5	144.3	145.0	148.1	149.1
Socks, stockings and tights (including pantihose)	90.8	100.0	106.7	119.5	109.1	115.4	117.1	122.0	123.4	129.2	130.9	135.4
Carpets	86.7	100.0	115.7	134.7	121.4	129.9	134.1	135.8	139.2	145.8	147.0	151.7
Made-up clothing	87.3	100.0	113.0	127.6	119.2	123.5	125.3	129.0	132.5	137.0	139.3	142.9
Materials and fuel purchased												
Textile industries	89.3	100.0	124.2	142.1	138.3	140.2	143.2	143.5	141.3	140.8	145.4	146.1
Commodities wholly or mainly imported												
Raw cotton	116.4	100.0	181.0	171.5	218.8	201.8	192.2	154.5	137.5	145.8	163.1	160.2
Raw wool	117.3	100.0	146.3	160.0	176.2	169.3	161.0	156.7	152.9	140.9	153.4	152.5
Man-made fibres	89.3	100.0	111.3	125.0	117.6	122.9	125.4	125.5	126.1	126.5	127.1	128.4

Table 6 Employment in textiles and clothing [1]

Thousands

	MLH	1976 December	1977 March	1977 June	1977 September	1977 December	1978 March	1978 June	1978 September
Great Britain									
Textiles	411-429	485.8	483.6	484.4	478.5	474.7	468.3	464.2	460.6
Production of man-made fibres	411	33.9	33.0	32.6	32.1	31.1	30.7	30.5	30.6
Spinning and doubling on the cotton and flax systems	412	51.7	51.4	51.0	49.7	49.3	48.2	46.9	45.9
Weaving of cotton, linen and man-made fibres	413	39.7	39.9	39.5	39.2	38.8	37.6	37.2	36.9
Woollen and worsted	414	81.6	81.4	82.2	81.9	80.3	79.6	79.5	78.3
Hosiery and other knitted goods	417	116.1	116.4	119.1	117.7	118.2	116.3	114.6	114.2
Carpets	419	35.4	35.3	34.7	33.8	33.4	32.7	32.5	32.3
Textile finishing	423	47.4	47.1	46.8	46.4	46.8	46.2	45.8	45.3
Clothing	441-449	295.2	294.9	297.1	293.6	292.9	290.5	289.8	288.3

[1] Employees in employment at middle of each month.

Table 7 Crude trade balance[1]

£ million at current prices

	1971	1972	1973	1974	1975	1976	1977	1976 4th qtr	1977 1st qtr	1977 2nd qtr	1977 3rd qtr	1977 4th qtr	1978 1st qtr	1978 2nd qtr	1978 3rd qtr
Textile fibres (division 26)															
Exports	87.3	108.1	172.1	201.8	183.5	260.6	308.2	78.4	92.6	81.6	67.9	66.1	62.8	75.2	66.2
Imports	150.0	213.7	322.4	310.5	263.4	438.3	467.3	120.3	140.6	127.5	95.0	104.2	129.5	142.0	110.0
Balance	−62.7	−105.6	−150.3	−108.7	−79.9	−177.7	−159.1	−41.9	−48.0	−45.9	−27.1	−38.1	−66.7	−66.8	−43.8
Textile yarns, fabrics, etc (division 65)															
Exports	425.8	445.4	589.5	745.8	698.2	934.2	1 147.0	274.6	287.7	292.2	280.5	286.6	303.4	316.2	287.2
Imports	324.9	369.7	514.9	688.2	682.8	911.4	1 118.7	259.7	288.9	274.8	270.2	284.8	342.4	361.9	351.9
Balance	+100.9	+75.7	+74.6	+57.6	+15.4	+22.8	+28.3	+14.9	−1.2	+17.4	+10.3	+1.8	−39.0	−45.7	−64.7
Clothing (division 84)															
Exports	129.5	144.3	179.6	230.0	265.5	412.3	598.0	135.1	119.2	126.9	172.8	179.1	144.7	150.1	184.2
Imports	178.2	218.8	333.6	402.4	505.1	683.8	766.6	182.8	201.5	177.0	199.5	188.6	215.0	204.6	252.4
Balance	−48.7	−74.5	−154.0	−172.4	−239.6	−271.5	−168.6	−47.7	−82.3	−50.1	−26.7	−9.5	−70.3	−54.5	−68.2

[1] Imports cif, exports fob.

Table 8 **Imports**

£ million at current prices (cif)

	Textile fibres (division 26)			Textile yarns, fabrics and made-up articles (division 65)											Clothing (division 84)		
	Man-made fibres, tow and waste	Wool tops	Total textile fibres	Woollen and worsted yarns	Cotton yarns and thread	Continuous filament yarns	Spun man-made fibre yarns	Cotton woven fabrics	Woollen and worsted woven fabrics	Man-made fibre woven fabrics	Knitted fabrics	Carpets	Total yarns, fabrics, etc	Made-up clothing	Hosiery and knitted garments	Total clothing
1971	16.9	2.8	150.0	4.1	10.2	54.2	7.3	70.4	7.9	57.1	16.6	12.2	324.9	99.6	68.8	178.2
1972	24.9	4.3	213.7	6.3	12.5	52.8	9.2	74.2	8.2	78.6	14.0	15.8	369.7	123.7	82.7	218.8
1973	35.4	5.3	322.4	11.0	15.5	70.7	17.0	103.5	11.8	115.3	12.7	21.3	514.9	197.8	112.3	333.6
1974	57.2	4.8	310.5	9.5	42.8	105.2	30.2	130.5	13.5	154.5	16.4	23.0	688.2	243.9	134.1	402.4
1975	45.5	3.8	263.4	11.1	28.3	92.2	28.7	125.7	16.6	167.2	18.5	27.4	682.8	307.5	166.7	505.1
1976	59.3	4.2	438.3	17.1	41.8	127.5	41.2	190.7	19.1	196.4	22.8	36.7	911.4	404.1	238.4	683.8
1977	71.0	6.8	467.3	22.7	54.7	154.0	49.3	219.2	31.2	259.3	24.3	46.0	1 118.7	437.8	272.8	766.6
1975																
1st qtr	10.4	1.0	56.1	2.2	6.6	20.7	5.9	31.7	3.2	44.5	3.6	5.9	166.8	68.0	37.2	111.0
2nd	10.8	0.8	74.2	3.0	6.8	20.6	6.8	29.8	5.0	41.4	4.3	6.7	166.0	79.4	39.5	125.1
3rd	12.1	1.1	70.4	2.8	7.0	24.9	7.0	30.1	5.0	39.9	5.4	6.7	167.4	75.7	45.9	130.7
4th	12.2	0.9	62.7	3.1	7.9	26.0	9.0	34.1	3.4	41.4	5.2	8.0	182.6	84.4	44.1	138.3
1976																
1st qtr	14.5	0.9	101.2	3.6	9.5	29.4	9.8	43.6	4.0	47.6	4.6	8.2	212.7	97.9	52.5	158.3
2nd	14.7	1.1	113.7	4.2	9.0	31.4	10.6	53.0	4.7	43.7	5.4	8.8	225.3	104.3	53.2	166.4
3rd	15.4	1.0	103.1	4.2	9.2	30.0	9.3	44.6	5.1	47.2	6.0	8.5	213.7	100.2	64.1	176.3
4th	14.7	1.2	120.3	5.1	14.1	36.7	11.5	49.5	5.3	57.9	6.8	11.3	259.7	101.7	68.6	182.8
1977																
1st qtr	19.0	1.2	40.6	5.8	14.8	40.1	11.6	57.9	6.2	67.0	6.6	10.0	288.9	117.7	71.0	201.5
2nd	19.0	1.6	127.5	5.4	14.7	37.9	12.0	57.0	8.1	56.8	5.9	10.8	274.8	102.5	62.0	177.0
3rd	15.4	1.8	95.0	5.5	12.6	36.3	11.2	52.4	8.7	66.8	5.4	11.1	270.2	110.7	73.1	199.5
4th	17.6	2.2	104.2	6.0	12.6	39.7	14.5	51.9	8.2	68.7	6.4	14.1	284.8	106.9	66.7	188.6
1978																
1st qtr	20.2	2.9	129.5	7.2	15.1	43.8	14.1	67.5	10.8	80.5	6.7	13.5	342.4	131.4	69.5	215.0
2nd	19.7	3.0	142.0	6.2	14.6	44.8	15.8	67.8	14.2	83.2	7.5	15.1	361.9	121.0	67.7	204.6
3rd	19.3	3.6	110.0	5.4	14.8	43.2	14.8	69.6	12.8	87.4	8.2	14.6	351.9	145.6	88.3	252.4

Source: Overseas trade statistics

Table 9 **Exports**

£ million at current prices (fob)

	Textile fibres (division 26)			Textile yarns, fabrics and made-up articles (division 65)										Clothing (division 84)		
	Man-made fibres, tow and waste	Wool tops	Total textile fibres	Woollen and worsted yarns	Cotton yarns and thread	Continuous filament yarns	Spun man-made fibre yarns	Cotton woven fabrics	Woollen and worsted woven fabrics	Man-made fibre woven fabrics	Knitted fabrics	Carpets	Total fabrics, etc	Made-up clothing	Hosiery and knitted garments	Total clothing
1971	45.5	16.3	87.3	23.3	10.1	80.4	9.6	28.6	62.8	31.6	54.4	34.2	425.8	61.8	49.0	129.5
1972	56.5	19.8	108.1	27.3	11.7	83.8	10.9	29.0	66.9	37.4	43.2	40.7	445.4	70.2	53.5	144.3
1973	77.7	38.1	172.1	37.0	17.0	110.0	18.6	39.5	91.5	49.9	43.1	63.0	589.5	86.9	68.0	179.6
1974	118.7	26.2	201.8	41.6	22.0	136.5	28.1	52.0	106.6	68.6	44.9	85.0	745.8	113.4	81.8	230.0
1975	101.3	28.6	183.5	37.5	18.5	112.8	23.3	46.9	92.5	68.2	44.3	74.6	698.2	137.1	89.3	265.5
1976	124.0	50.5	260.6	56.0	26.8	157.8	33.3	72.0	105.2	90.5	51.7	113.0	934.2	210.6	147.8	412.3
1977	153.2	56.9	308.2	77.5	27.3	174.5	36.1	94.4	151.4	112.0	56.9	141.5	1 147.0	320.9	215.8	598.0
1975																
1st qtr	26.2	5.2	43.2	8.3	4.6	26.0	5.9	12.1	21.9	17.6	8.2	16.9	165.1	27.0	17.2	52.5
2nd	32.1	7.0	52.1	9.4	4.4	28.0	5.9	10.7	24.4	16.7	11.8	17.5	174.5	29.8	16.8	54.8
3rd	21.4	8.0	41.3	8.7	3.9	25.8	4.6	11.2	23.8	15.0	11.4	16.3	161.4	37.9	26.8	75.2
4th	21.6	8.4	46.9	11.1	5.6	32.1	6.9	12.9	22.4	18.9	12.9	23.9	197.2	42.4	28.5	83.0
1976																
1st qtr	26.9	11.0	57.6	11.1	5.3	35.4	7.7	16.1	19.7	20.6	10.9	24.4	203.4	37.8	25.3	74.1
2nd	30.3	13.4	64.8	13.7	6.8	39.4	8.5	16.6	27.6	22.2	12.5	27.3	230.9	48.2	28.5	87.7
3rd	29.1	11.6	59.8	13.6	6.8	38.9	7.1	15.8	28.5	21.0	13.6	26.0	225.3	58.3	42.8	115.4
4th	37.7	14.5	78.4	17.6	7.9	44.1	10.0	23.5	29.4	26.7	14.7	35.3	274.6	66.3	51.2	135.1
1977																
1st qtr	46.1	18.0	92.6	20.0	7.1	45.7	10.3	24.2	31.2	28.4	13.8	37.4	287.7	65.2	40.6	119.2
2nd	40.2	15.8	81.6	19.9	7.7	47.5	9.5	22.1	37.5	29.3	14.1	36.4	292.2	72.5	41.0	126.9
3rd	35.6	11.7	67.9	17.8	6.1	40.9	7.2	23.3	42.9	27.0	14.0	33.4	280.5	89.8	65.5	172.8
4th	31.3	11.4	66.1	19.8	6.4	40.4	9.1	24.8	39.8	27.3	15.0	34.3	286.6	93.4	68.7	179.1
1978																
1st qtr	31.0	13.0	62.8	19.1	7.2	45.6	8.4	24.8	36.8	29.4	13.1	32.7	303.4	82.0	49.9	144.7
2nd	39.9	12.8	75.2	18.5	7.4	47.9	8.1	25.7	47.1	27.9	14.7	32.5	316.2	87.0	47.9	150.1
3rd	36.5	12.5	66.2	15.3	6.0	43.1	7.4	24.8	44.1	24.9	12.6	29.2	287.2	97.7	68.7	184.2

Source: Overseas trade statistics.

Table 10 Imports of raw materials – next page

Price Index Numbers for Current Cost Accounting

Price Index Numbers for Current Cost Accounting, prepared by the Central Statistical Office, is a booklet of price indices for companies and others who wish to prepare accounts or supplementary statements on the current cost basis. It is specified as a source of indices for the United Kingdom in the interim recommendation issued in November 1977 by the Accounting Standards Committee.

It presents all the available industry and asset-specific price indices likely to be useful for revaluing fixed assets, and includes the index of the cost of new construction and the general index of retail prices.

Table 10 **Imports of raw materials**

£ million at current prices (cif)

	Greasy wool (268.1)		Degreased wool (268.2)		Fine animal hair (268.3 and part 268.59)		Raw cotton (263.1)	
	mn kg	£m	mn kg	£m	mn kg	£m	mn kg	£m
1971	99	33	62	21	9	5	142	41
1972	130	56	77	23	18	13	137	44
1973	95	93	56	55	15	26	171	66
1974	65	67	56	48	9	21	93	61
1975	84	58	48	37	11	22	113	59
1976	112	121	50	54	15	50	122	95
1977	101	124	37	52	11	48	104	106
1975								
1st qtr	19	13	8	6	2	3	23	11
2nd	29	19	16	12	3	6	32	16
3rd	20	14	15	12	3	6	32	17
4th	16	12	9	7	3	7	26	15
1976								
1st qtr	35	32	10	10	3	8	38	23
2nd	28	28	17	17	5	14	34	25
3rd	24	27	13	15	3	10	26	22
4th	25	34	10	12	4	18	24	25
1977								
1st qtr	29	40	11	16	2	10	33	37
2nd	27	32	13	18	3	13	25	27
3rd	25	27	6	9	2	10	18	19
4th	20	25	7	9	4	15	28	23
1978								
1st qtr	34	43	10	15	3	12	28	21
2nd	37	46	9	12	4	20	36	29
3rd	26	33	8	12	3	15	18	16

Source: overseas trade statistics

Wholesale textile houses: sales and stocks in October

Sales by wholesale textile houses in October showed an increase of 15 per cent on a year earlier, compared with an increase of 29 per cent in August and an increase of 11 per cent in September.

The value of stocks at the end of October showed an increase of 10 per cent compared with the same period last year.

Inquiries: These statistics are prepared by Textile Distributors' Association. Inquiries should be addressed to the Secretary, Textile Distributors' Association, 3 Berners Street, London W1P 4JP, tel. 01-580 2902.

Table 2 Analysis by department

Percentage increase compared with a year earlier

	Sales		Stocks [2]
	Oct 1978	Jan-Oct 1978	Oct 1978
Women's knitted outerwear, blouses and skirts	13	5	– 4
Women's coats, costumes, furs and raincoats	– 6	30	– 1
Women's underwear	5	4	–17
Women's hose and children's socks	8	1	26
Haberdashery, ribbons and wool	– 5	6	9
Children's wear	–9	–14	–24
Men's and boys' ready made clothing and overalls	5	7	16
Gloves	7	9	–15
Piece-goods and nets	–23	–15	36
Household textiles	17	2	4
Floor coverings, furniture and hardware	28	24	30
Boots and shoes	–6	–7	29
Total [1]	15	12	10

[1] Including some items not included among the sub-headings.
[2] Values at cost.

Table 1 Textiles: wholesale sales and stocks

Index numbers and percentage increase compared with a year earlier

1950 = 100

	Value of home sales		Value of stocks end period	
1966	110	–3	..	..
1967	104	–5	..	..
1968	108	4	..	..
1969	103	–5	..	..
1970	107	4	..	..
1971	115	8	..	..
1972	121	5	..	..
1973	134	11	..	..
1974	147	9	..	..
1975	147	1	..	..
1976	146	–1	..	..
1977	149	2	..	..
1976 1st quarter	133	–8	234	7
2nd quarter	127	–6	212	8
3rd quarter	149	2	204	6
4th quarter	176	8	228	2
1977 1st quarter	140	5	252	7
2nd quarter	125	–2	224	6
3rd quarter	153	3	214	5
4th quarter	180	2	228	—
1978 1st quarter	144	3	234	–7
2nd quarter	141	13	222	–1
3rd quarter	179	17	234	10
1977 October	201	9	212	2
November	163	–4	245	7
December	175	—	228	—
1978 January	91	7	213	–3
February	149	1	224	–10
March	191	3	234	–7
April	138	–1	211	–8
May	148	15	231	–4
June	138	28	222	–1
July	133	12	240	1
August	183	29	239	5
September	221	11	234	10
October	230	15	233	10

Hosiery and other knitted goods: index of production

In the three months ended October 1978 the volume of production of hosiery and other knitted goods (including knitted fabrics), seasonally adjusted, was provisionally estimated to have been 4 per cent lower than in the three months ended October 1977.

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years. The actual figures allow for differences in the length of calendar months, but not for other seasonal variations.

Inquiries: 01-212 0017/6474.

Hosiery and other knitted goods, including warp knitting

1975 = 100

1973	105
1974	103
1975	100
1976	106
1977	106

	Actual	Seasonally adjusted
1976		
1st qtr	92	102
2nd	99	104
3rd	107	107
4th	124	109
1977		
1st qtr	97	107
2nd	98	104
3rd	108	108
4th	121	105
1978		
1st qtr	92	104
2nd p	98	103
3rd p	104	103
1977		
January	95	112
February	99	104
March	97	105
April	94	104
May	100	104
June	100	104
July	99	108
August	102	106
September	123	108
October	131	103
November	127	103
December	104	110
1978		
January	87	102
February	99	105
March	91	104
April p	100	107
May p	92	100
June p	102	102
July p	90	98
August p	105	108
September p	116	102
October p	121	95

p Provisional.

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Engineering industries: indices of production up to September

Output of the combined engineering industries was nearly 2 per cent higher in the third quarter of 1978 than in the second continuing the upward trend which now appears to have begun at the end of 1977. This allows a more optimistic view of the UK engineering industries to be taken than could be seen from previous figures, and this interpretation is strengthened by the observation that all three major sectors appear to have benefited.

The level of mechanical engineering production in the third quarter was about 2 per cent higher than in the second, and about 2 per cent higher than in the same quarter a year earlier. After a substantial increase in output in the second quarter the instrument engineering sector improved its position still further in the third; to complete a generally satisfactory picture, the rising trend in the electrical engineering sector, dating from the second half of 1977, continued unabated.

As usual the indices for individual industries within the mechanical engineering sector show widely disparate movements between the latest two quarters. In general, however, the larger falls, such as experienced by 'agricultural machinery' and 'textile machinery' have been in industries with relatively low weights while those with higher weights have tended to either show increased production or only minor falls. Unfortunately due to insufficient response, the estimate for the industry with the highest weight, 'industrial plant and fabricated steelwork', is not yet thought to be sufficiently firm to allow publication. The indications do suggest, however, a large rise in the third quarter for this industry.

Within the instrument engineering sector the 'scientific and industrial instruments' industry was largely responsible for the sharp rise in output in the second quarter. The output of this industry fell back somewhat in the third quarter, but this was more than offset by the combined efforts of the three smaller industries in the sector. The striking recovery of the diminutive 'watches and clocks' industry over the last two quarters is particularly noteworthy.

In electrical engineering, as in mechanical, the poorer performances in the third quarter were shown in the main by the smaller industries. In particular the 'records and tapes' and 'broadcasting equipment' industries did not fare well, while the one larger industry to show more than a minor fall was 'telecommunications'. Output of the 'telecommunications' industry has been at a very depressed level for more than two years now. The performance of the 'computers' industry was outstanding in this period and along with more modest gains by the larger 'electrical machinery' and 'electronic capital goods' industries this ensured an overall increase of 2 per cent over the quarter for the electrical engineering sector as a whole.

Inquiries: (on the article and the statistics) Miss L. John, Branch EcS 3A, Department of Industry, Room 607, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 5770. Requests for quarterly indices for past years: Mr P. Coulson, Branch 5, Central Statistical Office, Great George Street, London SW1P 3AG, tel. 01-233 7239.

Indices of production for engineering industries
Seasonally adjusted volumes indices

MLH		1975 = 100 Weight (percentage)	1976	1977 p	1976 4th qtr	1977 1st qtr p	1977 2nd qtr p	1977 3rd qtr p	1977 4th qtr p	1978 1st qtr p	1978 2nd qtr p	1978 3rd qtr p	Per cent change 3rd qtr 78 average on previous 2nd qtr 78
3310	Agricultural machinery	1.07	96.6	93.6	99.8	99.0	88.7	94.6	92.2	92.2	99.2	85.6	−14
3320	Machine tools	2.94	83.3	80.0	82.5	82.0	78.8	79.3	80.0	80.3	79.4	79.1	–
3331	Pumps	1.33	107.6	110.9	114.0	112.3	114.6	112.7	103.9	104.9	114.1	113.5	−1
3332	Valves	1.87	91.2	96.3	96.7	98.0	88.6	104.6	94.2	94.7	96.1	98.8	+3
3333/4	Compressors	1.90	97.9	101.4	99.9	100.8	98.8	101.5	104.7	104.6	102.0	104.6	+3
3340	Industrial engines	1.54	100.9	109.3	97.6	112.4	104.8	108.6	111.3	103.0	107.4	102.8	−4
3350	Textile machinery	1.89	69.6	46.7	58.3	52.0	43.3	42.8	48.8	40.9	42.7	38.4	−10
3360	Construction equipment	2.99	99.1	100.0	98.0	110.3	95.6	98.1	96.2	89.4	96.9	89.4	−8
3370	Mechancial handling equipment	3.72	90.1	88.0	90.5	92.5	90.3	88.8	80.6	84.3	88.9	[2]	
3380	Office machinery	1.25	95.9	97.2	99.7	97.1	94.9	97.2	99.4	70.1	71.3	[2]	
3391	Mining machinery	1.54	93.1	87.2	87.4	81.4	85.6	85.9	95.8	106.7	99.5	[2]	
3392	Printing and paper machinery	1.05	86.7	86.6	86.0	87.2	86.3	84.1	88.9	83.6	[2]	[2]	
3393/4	Refrigerating and space-heating machinery	2.40	94.6	93.6	94.8	98.0	95.2	93.2	87.9	96.7	97.0	94.0	−3
3396/8	Weighing machinery and power tools	0.75	99.3	101.6	98.5	100.8	104.1	94.4	107.3	117.2	113.2	104.2	−8
3397/8	Food processing machinery packaging machinery	1.62	93.6	90.0	87.4	90.6	89.2	97.4	82.7	86.7	88.5	93.5	+6
3399	Other non-electrical machinery	3.79	96.5	96.5	91.1	110.2	93.3	90.2	92.2	102.8	91.5	98.8	+8
3414	Constructional steelwork	3.51	93.1	79.0	86.4	80.8	78.7	80.4	76.1	77.1	84.9	84.4	−1
3415	Industrial plant and fabricated steelwork	9.59	101.9	101.2	100.7	99.7	103.9	100.6	100.6	97.1	97.4	[2]	
3491	Ball, roller and plain bearings	1.76	99.2	97.9	102.7	102.3	98.3	96.3	94.8	95.2	95.8	93.9	−2
	Other mechanical engineering	7.64	95.6	95.5	94.4	97.0	94.6	97.6	92.8	98.6	96.0	98.1	+2
	Mechanical engineering	54.14	95.1	93.2	93.6	95.8	92.6	93.1	91.3	91.9	92.9	95.0	+2
3510	Photographic and copying equipment	0.42	99.7	103.1	115.2	101.1	105.4	105.7	100.3	135.9	134.0	139.0	+4
3520	Watches and clocks	0.51	91.3	90.5	92.3	84.5	88.2	98.1	91.4	87.2	96.8	109.8	+13
3530	Surgical instruments	1.42	91.5	89.2	93.0	91.9	88.3	89.1	87.6	87.5	86.6	89.6	+3
3540	Scientific and industrial instruments	4.80	98.4	102.0	102.8	98.5	103.2	102.5	103.7	102.6	110.0	108.6	−1
	Instrument engineering	7.15	96.6	98.7	100.8	96.3	99.3	99.7	99.4	100.5	105.8	106.7	+1
3610	Electrical machinery	6.81	97.6	102.1	98.1	100.1	101.3	104.2	102.6	109.1	103.6	108.3	+5
3620	Wires and cables	2.64	101.6	107.5	108.5	109.8	107.9	108.8	103.3	103.0	105.6	104.7	−1
3630	Telecommunications	4.62	86.8	72.2	76.9	72.3	71.8	73.7	71.2	66.7	71.6	67.1	−6
3640	Electronic components	5.18	106.6	121.4	114.6	120.2	122.0	120.5	123.0	133.6	136.2	136.3	–
3651	Records and tapes	0.59	93.1	95.7	90.4	105.9	92.6	89.1	95.2	100.1	111.4	91.0	−18
3652	Broadcasting equipment	1.73	92.4	89.7	100.5	87.2	84.4	96.5	90.7	93.4	112.0	102.3	−9
3660	Computers	3.20	103.4	122.4	108.7	107.5	116.4	132.9	133.0	143.0	139.2	161.3	+16
3670	Electronic capital goods	5.37	104.5	116.0	108.0	114.3	113.7	114.5	121.4	119.2	117.7	121.6	+3
3680	Domestic electrical appliances	3.10	92.2	93.2	97.0	100.5	88.3	93.8	90.1	86.8	94.8	94.8	–
3691	Electric parts for vehicles	2.15	97.3	89.7	95.8	94.5	98.2	75.1	91.0	99.1	90.1	91.2	+1
3692/3	Batteries	1.19	99.2	98.4	95.7	101.3	88.5	99.0	104.6	101.5	113.6	110.8	−2
3694	Lamps and other electrical	2.14	96.4	98.0	98.8	100.6	98.7	98.1	94.8	106.9	108.7	105.6	−3
	Electrical engineering	38.71	98.5	102.7	100.5	102.0	101.3	103.4	104.1	107.6	108.8	110.5	+2
	Combined engineering	100.00	96.5	97.3	96.8	98.3	96.4	97.6	96.8	98.6	100.0	101.8	+2

[1] Averages if for other than a calendar quarter should not be compared with those in the preceding column since the estimates are not independent. [2] Not available owing to insufficient response.
p Provisional.

Particulars of dealers in securities and of unit trusts

The following changes have taken place in part 5 of the 1978 edition of 'Particulars of Dealers in Securities and of Unit Trusts' published in May under the Prevention of Fraud (Investments) Act 1958:

Part 5 Authorised unit trust schemes

Group and/or name and address of management company	Schemes	Trustee
Additions		
Abbey Unit Trust Managers Ltd, 1/3 St Paul's Churchyard, London EC4M 8AR	Abbey Gilt and Fixed Interest Trust	The Royal Bank of Scotland, London Trustee Co, 49 Charing Cross, London SW1A 2DX
Changes		
Delete		
Cabot Unit Trust Management Co Ltd, The Bristol and West Building Broad Quay, Bristol BS1 4DD	Cabot Exempt Retirement Trust	Williams and Glyn's Bank Ltd, 20 Birchin Lane, London EC3P 3DP
and replace by		
N. M. Rothschild Asset Management Ltd. PO Box No 185, Newcourt, St Swithin's Lane, London EC4P 4DU	New Court Exempt Equity Fund	Williams and Glyn's Bank Ltd, 20 Birchin Lane, London EC3P 3DP

Patents recorded 'licences of right'

Under section 46 of the Patents Act 1977 the register was noted 'licences of right' in respect of the following patents on the date specified:

14 December 1978

1067926 Sprague Electric Co
Improvements in or relating to semiconductors

1102675 Sprague Electric Co
Improvements in or relating to electrolytic capacitors

1185251 Sprague Electric Co
Improvements in or relating to low temperature fired ceramic bodies and electrical components incorporating such bodies

1328874 Sprague Electric Co
Improvements in and relating to semiconductor devices

1333698 Sprague Electric Co
Improvements in and relating to ceramic materials

1207893 Sprague Electric Co
Improvements in or relating to encapsulated components

1229530 Sprague Electric Co
Improvements in or relating to flat pack capacitors

1243391 Sprague Electric Co
Improvements in or relating to limiter-discriminator and gate circuits

1257136 Sprague Electric Co
Improvements in or relating to high noise immunity gates

1261365 Sprague Electric Co
Improvements in or relating to semiconductive devices

1279932 Sprague Electric Co
Improvements in and relating to electric variable capacitors

1280088 Sprague Electric Co
Improvements in and relating to electric variable capacitors

1307665 Sprague Electric Co
Improvements in and relating to electric impedance

1309411 Sprague Electric Co
Improvements in and relating to the manufacture of electrical components

1314478 Sprague Electric Co
Wet electrolytic capacitors

1324739 Sprague Electric Co
Improvements in and relating to electrical capacitors

1347442 Sprague Electric Co
Improvements in and relating to electrolytic capacitors

1366847 Sprague Electric Co
Solid electrolytic capacitors and method of making same

1380662 Sprague Electric Co
Improvements in and relating to electric capacitors

1381987 Sprague Electric Co
Electrolytic production of aluminium oxide films

1390169 Sprague Electric Co
Improvements in and relating to electric components

1396494 Sprague Electric Co
Ceramic slip composition

1411072 Sprague Electric Co
Improvements in and relating to pellet systems

1419729 Sprague Electric Co
Improvements in and relating to electrical capacitors

1420731 Sprague Electric Co
A multisection electrolytic foil capacitor

1425211 Sprague Electric Co
Improvements in and relating to electrical components

1438909 Sprague Electric Co
Improvements in and relating to component packages

1457036 Sprague Electric Co
Improvements in and relating to resistors

1459647 Sprague Electric Co
Improvements in and relating to electrical capacitors

1470497 Sprague Electric Co
Resistance materials and resistors made therewith

1481754 Sprague Electric Co
Method for preparing the container of an electrolytic capacitor

1488228 Sprague Electric Co
Method of making a solid electrolyte capacitor

1488476 Sprague Electric Co
Improvements in or relating to a terminal-cover assembly for an electrical component package

1490046 Sprague Electric Co
Improvements in and relating to electrolytic processes and devices

1491818 Sprague Electric Co
Electrolytic capacitor

1492287 Sprague Electric Co
Capacitor and electrolyte

1502558 Sprague Electric Co
Temperature stable monolithic ceramic capacitor

1505019 Sprague Electric Co
Improvements in and relating to electrical capacitors

1512764 Sprague Electric Co
Improvements in and relating to electrical components

1516067 Sprague Electric Co
Improvements in and relating to electrolytic capacitors

1205593 Telefunken Patent verwertungs gesellschaft m.b.H
Magnetic reed relay

1260871 Agfa-Gevaert Aktiengesellschaft
Still or cinematographic camera

1504986 Werkhuizen Joseph Verbeemen
Installation for drawing off beer

18 December 1978

989703 British-American Tobacco Co Ltd
Improvements relating to the processing of smoking tobacco

999057 British-American Tobacco Co Ltd
Improvements relating to cigarette filters

1112454 British-American Tobacco Co Ltd
Improvements relating to filters for tobacco smoke

1123179 British-American Tobacco Co Ltd
Improvements relating to smoking tobacco

1150192 British-American Tobacco Co Ltd
Improvements relating to cigarette filters

1163349 British-American Tobacco Co Ltd
Improvements relating to tobacco-smoke filters

1194572 British-American Tobacco Co Ltd
Improvements in cigarettes

1205435 British-American Tobacco Co Ltd
Improvements relating to mouthpiece tobacco articles

1228260 British-American Tobacco Co Ltd
Improvements relating to tobacco smoke filters

1228747 British-American Tobacco Co Ltd
Improvements relating to smoking articles

1235692 British-American Tobacco Co Ltd
Improvements relating to smoking articles

1255657 British-American Tobacco Co Ltd
Improvements relating to tobacco-smoke filters

1256808 British-American Tobacco Co Ltd
Improvements relating to smoke filters

1257290 British-American Tobacco Co Ltd
Improvements relating to tobacco-smoke filters

1265966 British-American Tobacco Co Ltd
Improvements relating to smoking articles

1267272 British-American Tobacco Co Ltd
Improvements relating to the packaging of liquids

1287147 British-American Tobacco Co Ltd
Improvements relating to cigarette filters

1315374 British-American Tobacco Co Ltd
Improvements relating to the catalytic oxidation of carbon monoxide

1332503 British-American Tobacco Co Ltd
Improvements relating to smoking compositions

1338913 British-American Tobacco Co Ltd
Improvements relating to smoking articles

1340581 British-American Tobacco Co Ltd
Improvements relating to packaging machines

1341069 British-American Tobacco Co Ltd
Improvements relating to smoking materials

1348580 British-American Tobacco Co Ltd
Improvements relating to reconstituted-tobacco smoking materials

1353471 British-American Tobacco Co Ltd
Improvements relating to flexible packages

1365807 British-American Tobacco Co Ltd
Improvements relating to smoking materials

1382266 British-American Tobacco Co Ltd
Improvements relating to the production of smoking articles

1441983 British-American Tobacco Co Ltd
Improvements relating to the dispensing of liquids by motor driven syringes

1436921 United States Department of Energy
X-ray image intensifier phosphor screen

1452225 United States Department of Energy
Formaldehyde based disinfectants

1457325 United States Department of Energy
Removal of excess solder from printed circuit boards after coating

1354929 Poclain Hydraulics SA
Improvements in or relating to drive devices

1366457 Poclain Hydraulics SA
A fluid operated actuator

1372803 Poclain Hydraulics SA
Device for supplying fluid under pressure to two reversible load elements

1380226 Poclain Hydraulics SA
Improvements relating to fluid supply apparatus

1384451 Poclain Hydraulics SA
Improvements in or relating to hydraulic motors

1427622 Standard Telephones and Cables Ltd
Improvements in or relating to transmission systems

1476471 Standard Telephones and Cables Ltd
Gallium arsenide photocathodes

1225276 Harry Calverley
Buoyant garment

1345477 Societe Anonyme Automobiles Citroen
Improvements in or relating to vehicle windows

1409922 Moteurs Goiot
Hatch cover for use in boats

1459730 'Jaguar' Stahlwaren vertriebsgesellschaft mgH and Co Kommanditgellschaft
Scissors with restricted pivoting of bows

1465526 Quantel SA
Process for filtering and amplifying laser beams

1517829 Princeton Polymer Laboratories Inc
Polyethylene waxes

Any person who claims that the proprietor of the patent is, and was at the time of entry, precluded by a contract in which the claimant is interested from granting licences under the patent may, within three months after the making of the relevant entry, apply to the Comptroller on patents form 31/77 for cancellation of the entry.

I. J. G. Davis, Comptroller

Reserves rise in December

The UK official reserves rose by $25 million during December. During the month, the government made repayments of long-term debts to the United States and Canada amounting to $208 million.

Accruals of foreign currency borrowing by the public sector under the exchange cover scheme amounted to $318 million, and repayments – including early repayments – to $146 million. At the end of December, the reserves stood at $15,694 million.

Food survey indicates increase in real value of purchase

Average expenditure on food bought by households in Great Britain for consumption in the home (excluding sweets and soft drinks) rose by 32p (5.7 per cent), compared with the previous quarter, to £5.81 per person per week, while the survey index of food prices actually paid by housewives fell by 1.6 per cent mainly because of seasonally cheaper fresh fruit and vegetables.

These changes imply a gain of over 7 per cent in the overall real value of purchases per head, nearly half of this gain being due to increased purchases of meat and meat products and nearly two-fifths to increased purchases of fresh fruit and vegetables.

Compared with the third quarter of 1977, the survey index of food prices rose by less than 8 per cent while expenditure rose by 75p (14.8 per cent), implying a gain in real value over the year of more than 6½ per cent. This increase was distributed over a wide range of foods.

Household consumption of liquid milk was almost unchanged compared with the previous quarter, but purchases of cheese and of butter increased slightly to reach almost the same levels as a year previously. Total consumption of soft margarine (and of yellow fats in total) remained unchanged but that of other margarine again fell and was about 25 per cent lower than a year ago. Increased consumption was recorded for all other fats and notably cooking oil.

The average price paid by housewives for eggs fell further from 49p per dozen in the previous quarter to 46p, and in real terms was at its lowest level since 1972; nevertheless, purchases increased very little between the second and third quarters of 1978 and were about 9 per cent below the level achieved in the third quarter of 1972.

Purchases of sugar appear to have been stimulated in the third quarter of 1978 by the abundant supplies of fresh fruit, and perhaps especially that from gardens and allotments. Consumption of marmalade, syrup and treacle was rather less than in the corresponding period of the previous year and purchases of jam were barely maintained.

Expenditure on meat and meat products rose to £1.90 per person per week and now represents 33 per cent of the household food expenditure recorded by the survey, compared with 21 per cent on other animal protein foods (milk, cheese, eggs and fish), 17 per cent on fruit and vegetables and 15 per cent on bread and other cereal-based foods.

The estimates of consumption presented in table 1 have, as usual, been obtained by measuring quantities purchased plus free supplies. Some of these estimates, particularly those for carcase meat, are subject to a large amount of sampling variation because of bulk-buying by households owning a deep-freezer.

Because of this, the survey technique has been extended to include measurements of usage from deep-freezers. These measurements enable more accurate estimates of actual consumption (as opposed to purchases) to be derived. When this additional information is taken into account, actual consumption of beef in the third quarter of 1978 is estimated as 7.75 oz per person per week (instead of 7.97 oz shown in table 1). This is virtually the same as the similarly adjusted estimate for the previous quarter, but it represents an increase of over 5 per cent compared with that for the third quarter of 1977.

The adjusted estimate of consumption of lamb was 3.74 oz per person per week in the third quarter of 1978, representing an increase of nearly 5 per cent compared with the previous quarter but a decrease of nearly 4 per cent over the year.

The estimate for pork was again barely affected by the adjustment (3.30 oz instead of 3.33 oz) and represented an increase of more than 6 per cent compared with the previous quarter and of nearly 8 per cent over the year.

Compared with the previous quarter and with the third quarter of 1977, purchases of bacon, ham, poultry and most meat products all increased.

Consumption of fish showed some recovery from the low levels recently recorded, the increase being mainly of cooked fish purchased from fish-fryers, and of fresh or frozen white fish. As expected, household purchases of canned salmon fell sharply at the beginning of August after some supplies had been temporarily withdrawn for health reasons.

The average prices paid by housewives for potatoes were about 10 per cent lower in the third quarter of 1978 than a year earlier and household purchases were greater by over 12 per cent, but free supplies averaged only 6.0 oz compared with 8.9 oz per person per week, and the impetus given to garden and allotment produce by price increases and shortages after 1973 appears to have lost some momentum. Similarly, garden and allotment supplies of greens and other fresh vegetables recorded by the survey were lower, and this decrease was compensated by increased purchases.

Purchases of practically all kinds of processed vegetables were higher than in the corresponding period of 1977. In contrast, both own-grown and commercial supplies of

Table 1 Estimates of average household food consumption [1]

oz per person per week [2]

	Year 1976	Year 1977	3rd qtr 1977	2nd qtr 1978	3rd qtr 1978
Liquid milk (pints)	4.71	4.54	4.53	4.45	4.40
Other milk (eq. pints)	0.34	0.35	0.35	0.35	0.36
Cheese	3.79	3.80	3.87	3.65	3.82
Butter	5.16	4.70	4.58	4.39	4.53
Margarine	3.06	3.48	3.06	3.56	3.40
Lard and compound cooking fat	1.86	1.88	1.80	1.67	1.92
Eggs: purchases (number)	3.93	3.79	3.70	3.73	3.81
consumption (number)	4.08	4.00	3.98	3.92	3.96
Preserves	2.29	2.36	2.25	2.10	2.10
Sugar	12.20	12.09	11.76	10.79	12.89
Beef and veal	7.62	8.25	7.14	7.30	7.97
Mutton and lamb	4.20	3.97	4.63	3.68	4.45
Pork	2.89	3.32	3.44	3.12	3.33
Bacon and ham, uncooked	4.03	4.34	4.14	4.12	4.48
Bacon and ham, cooked (including canned)	0.99	1.03	1.09	1.11	1.25
Poultry and cooked chicken	6.00	6.17	6.07	5.58	6.34
Other cooked meat (not canned)	0.51	0.47	0.48	0.56	0.52
Other canned meat	2.32	2.08	2.22	2.27	2.38
Offals	1.16	1.21	1.08	1.04	1.07
Sausages, uncooked	3.29	3.47	3.31	3.12	3.60
Other meat products:					
meat pies and sausage rolls (ready-to-eat)	0.72	0.76	0.87	0.78	0.90
all others (not frozen)	2.13	2.27	2.18	2.39	2.58
Fish, fresh and processed	2.68	2.41	2.29	2.31	2.59
Canned fish	0.65	0.56	0.56	0.63	0.53
Fish and fish products, frozen	1.26	1.20	1.15	1.11	1.24
Fresh green vegetables	11.40	12.15	17.50	11.59	16.68
Tomatoes, fresh	3.94	3.75	5.84	3.54	5.74
Other fresh vegetables	10.58	10.98	11.20	9.57	11.85
Frozen vegetables	3.24	3.63	2.57	4.31	3.36
Canned tomatoes	1.06	1.17	1.04	1.34	1.03
Canned peas	2.84	2.54	2.14	2.50	2.45
Canned beans	3.99	3.97	3.59	3.82	3.92
Potatoes (excluding processed):					
purchases	31.84	35.93	33.78	35.49	37.91
consumption	35.30	40.79	42.65	36.60	43.94
Citrus fruit	4.73	4.90	2.83	5.60	3.26
Bananas	2.89	2.96	3.19	2.99	3.17
Apples	7.44	6.46	5.04	6.40	6.67
All other fresh fruit	3.25	3.20	6.86	2.62	7.62
Canned fruit	3.56	3.19	3.25	3.22	2.94
Dried fruit, nuts and fruit and nut products	1.42	1.33	1.08	0.92	1.06
Flour	6.02	6.46	5.90	6.14	5.47
White bread	26.43	25.80	25.14	25.35	25.20
Brown, wholewheat and wholemeal bread	3.60	3.70	3.73	3.78	4.12
Other bread	3.14	3.22	3.40	3.41	3.34
Buns, scones and teacakes	1.11	1.07	0.83	0.91	1.00
Cakes and pastries	2.85	2.80	2.75	2.66	2.78
Chocolate biscuits	0.99	0.94	0.85	1.04	1.01
Other biscuits	4.63	4.68	4.72	4.44	4.49
Breakfast cereals	3.25	3.30	3.39	3.52	3.59
Oatmeal and oat products	0.49	0.51	0.33	0.39	0.33
Canned milk puddings	1.53	1.36	1.27	1.07	1.13
Tea	2.21	2.07	1.84	1.86	2.05
Instant coffee	0.51	0.36	0.33	0.43	0.47
Canned soups	3.19	2.80	2.00	2.08	2.09
Pickles and sauces	1.66	1.66	1.51	1.79	1.56

[1] Purchases plus 'free' supplies. [2] Except where otherwise stated. Source: Ministry of Agriculture, Fisheries and Food.

Table 2 Estimates of average household food expenditure

pence per person per week

	Year 1976	Year 1977	3rd qtr 1977	2nd qtr 1978	3rd qtr 1978
Total household food expenditure	£4.41	£5.10	£5.06	£5.49	£5.81
	p	p	p	p	p
Liquid milk	40.80	48.46	50.18	54.11	54.21
Other milk	4.36	4.67	4.94	5.74	5.90
Cheese	12.06	15.10	15.76	15.95	17.15
Butter	12.74	14.36	13.27	14.41	16.50
Margarine	4.67	6.65	6.18	6.85	6.79
Lard and compound cooking fat	2.22	2.73	2.72	2.49	2.88
Eggs	14.04	15.36	14.98	15.13	14.63
Preserves	3.49	3.99	3.91	3.94	4.11
Sugar	8.87	9.11	8.86	8.52	10.46
Beef and veal	35.78	43.08	38.78	43.61	48.93
Mutton and lamb	15.43	17.02	19.36	17.99	22.90
Pork	11.37	13.94	14.45	14.96	16.85
Bacon and ham, uncooked	18.35	20.51	19.96	20.77	23.43
Bacon and ham, cooked (including canned)	6.14	6.60	7.18	7.67	9.04
Poultry and cooked chicken	14.58	17.77	17.65	17.78	20.64
Other cooked meat (not canned)	2.60	2.63	2.75	3.48	3.51
Other canned meat	7.28	7.70	8.56	8.47	8.99
Offals	3.36	3.71	3.44	3.44	3.77
Sausages, uncooked	8.16	9.53	9.16	9.41	11.05
Other meat products:					
meat pies and sausage rolls (ready-to-eat)	2.05	2.40	2.80	2.70	3.29
all others (not frozen)	7.01	8.75	8.69	10.22	11.74
Fish, fresh and processed	10.66	11.72	10.89	13.08	14.57
Canned fish	2.80	2.95	2.97	3.82	3.07
Fish and fish products, frozen	4.80	5.65	5.40	5.92	6.58
Fresh green vegetables	6.66	7.42	7.11	9.06	8.67
Tomatoes, fresh	5.31	6.02	7.39	9.97	7.42
Other fresh vegetables	7.89	8.88	7.81	9.71	9.43

	Year 1976	Year 1977	3rd qtr 1977	2nd qtr 1978	3rd qtr 1978
Total household food expenditure	£4.41	£5.10	£5.06	£5.49	£5.81
	P	P	P	P	P
Frozen vegetables	5.31	6.64	4.82	6.67	5.78
Canned tomatoes	1.00	1.26	1.12	1.44	1.17
Canned peas	2.31	2.35	2.05	2.48	2.41
Canned beans	3.48	3.71	3.38	3.81	3.95
Potatoes (excluding processed)	21.27	16.39	10.63	17.82	10.83
Citrus fruit	4.13	4.90	3.32	5.53	3.85
Bananas	2.86	3.50	4.01	3.92	4.23
Apples	5.75	7.28	6.54	9.02	7.83
All other fresh fruit	3.01	3.61	8.43	2.60	10.03
Canned fruit	4.64	5.11	5.37	5.75	5.32
Dried fruit, nuts and fruit and nut products	2.98	4.11	3.51	3.21	3.56
Flour	2.46	3.48	3.37	3.75	3.44
White bread	17.50	20.69	20.77	23.61	24.27
Brown wholewheat and wholemeal bread	3.13	3.77	3.86	4.40	4.98
Other bread	4.30	5.10	5.45	5.92	6.00
Buns, scones and teacakes	2.03	2.30	1.92	2.20	2.46
Cakes and pastries	7.85	8.85	8.80	9.55	9.91
Chocolate biscuits	3.48	3.99	3.81	4.96	4.74
Other biscuits	8.53	9.99	10.33	10.50	10.81
Breakfast cereals	5.59	6.64	7.04	7.59	7.76
Oatmeal and oat products	0.53	0.64	0.43	0.56	0.44
Canned milk puddings	1.23	1.19	1.12	1.01	1.13
Tea	7.04	12.64	13.70	11.85	12.90
Instant coffee	5.94	8.28	9.08	10.29	10.61
Canned soups	3.08	3.13	2.29	2.48	2.56
Pickles and sauces	2.80	3.19	2.95	3.63	3.28
Other foods	35.35	40.83	42.50	45.39	49.94

apples, stone fruit and soft fruit were greater than a year before. There were also increases in supplies of citrus fruits. Consumption of canned fruit declined but that of fruit juices increased.

Overall consumption of bread showed very little change. In total, the real value per head of household purchases of the group of other cereal foods was 3 per cent greater than in both the previous quarter and the third quarter of 1977.

Consumption of tea and of instant coffee both showed some recovery.

Table 3 shows that the increased purchases of meat and meat products, cooking fats, sugar and potatoes raised the energy content of the average diet from the level of the previous quarter. The increases in meat also raised protein, iron and B-vitamin intakes, although the marginal decline in milk consumption offset these to a small extent. Vitamin C was seasonally high because of the increased contribution from fresh vegetables including potatoes.

The nutritional value of the diet in families with four or more children also showed an improvement.

The national food survey, conducted on behalf of the Ministry of Agriculture, Fisheries and Food, is a continuous sampling inquiry into the domestic food consumption, expenditure and nutrition of private households in Great Britain. By obtaining information simultaneously about the quantities, cost and varieties of food purchased by a random sample of housewives, the survey enables comparisons (subject of course to sampling variation) to be made of dietary and food expenditure patterns and of average prices actually paid for food, not only in Great Britain as a whole but also by different kinds of households. Detailed reports are published annually. The latest volume giving information on household food consumption and expenditure in 1977 is now being printed.

Inquiries: Ministry of Agriculture, Fisheries and Food, National Food Survey Branch, Tolcarne Drive, Pinner, Middlesex HA5 2DT, tel. 01-868 7161, ext. 44.

Table 3 Nutritional value of household food as a percentage of recommended intakes [1] [2]

	National averages					Households with four or more children			
	Year 1976	Year 1977	3rd qtr 1977	2nd qtr 1978	3rd qtr 1978	Year 1976	Year 1977	Averages of the July-September quarters in the three most recent years	Averages for year ended September 1978
Energy	95	94	92	91	95	91	85	85	86
Protein	121	120	119	117	122	109	101	102	103
Calcium	184	183	182	180	181	160	151	151	149
Iron	103	98	98	97	103	92	82	86	85
Thiamin	122	129	131	122	127	123	120	121	122
Riboflavin	126	128	127	135	138	126	120	121	132
Nicotinic acid equivalent	184	185	184	181	191	176	166	170	175
Vitamin C	166	178	217	176	230	138	145	187	161
Vitamin A (retinol equivalent)	212	210	195	206	203	204	181	158	179
Vitamin D [3]	83	83	79	83	83	70	70	72	73

[1] Department of Health and Social Security 'recommended intakes of nutrients for the United Kingdom'. Reports on public health and medical subjects, no. 120, HMSO, 1969. [2] All values make allowance for wastage in the home of 10 per cent of the edible portion of food bought, and for expected losses of nutrients during cooking. [3] The survey does not evaluate welfare and pharmaceutical sources of this (or any other) vitamin. Furthermore, most adults need no dietary Vitamin D, since they obtain all they need from the action of sunlight on the skin.

New companies registered in Northern Ireland in November

The number of companies registered in Northern Ireland in November and nominal capital are as follows:

	Nov 1978	Jan to Nov 1978	Nov 1977
Public companies limited by shares	—	—	1
Private companies limited by shares	66	726	68
Private unlimited companies	—	2	—
Public companies limited by guarantee not having a share capital	—	5	1
Private companies limited by guarantee not having a share capital	—	8	—
Private companies limited by guarantee having a share capital	—	—	—
Total nominal capital of companies incorporated	£2 995 400	£35 643 626	£3 272 600

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 5 January 1979.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
Don's Party	BR/E 39881/7/1/84	90	4 January	Miracle Films Ltd	Doublehead Productions Pty Ltd
Movietone News 2587	BR/E 39828/7/1/84	8	5 January	British Movietonews Ltd	British Movietonews Ltd
FOREIGN					
One Day Of Raiku	F 39880	13	4 January	Contemporary Films Ltd	Yugoslavia Film, Belgrade
Maxim					
Faces Of Michael Caycoyannis	F 39883	27	5 January	Contemporary Films Ltd	ICP, Paris
Camouflage	F 39884	95	5 January	Contemporary Films Ltd	Film Polski, Warsaw

CORRECTION TO THE REGISTER
The registration number of the film 'Outrageous', registered on 19 September 1978, has been corrected to BR/E 39749/24/9/83.

Cinema admissions and takings in September

During September, counted as a five week period, the weekly average of admissions to cinemas in Great Britain was 2.63 million and the weekly average of gross box office takings was £2.55 million. Comparable figures for September 1977 were 2.29 million and £1.97 million.

The first interim allocation for the twenty-second year will be at the rate of 38 per cent.

Letters to the editor

Letters to the editor should be addressed to the Editor, *Trade and Industry*, Eighth Floor, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

British Film Fund Agency returns

The British Film Fund Agency has authorised the publication of the following information for the nine weeks ended 25 November 1978:

	£
Distributors' earnings submitted	
Low-cost films:	
Eligible (after multiplying by 2½)	55 305
Not eligible for 2½ times rental	92 448
	147 753
High cost films (including newsreels after multiplying by 2½)	976 106
	1 123 859
Films under 3000 ft (after multiplying by 2½)	493 792
	1 617 651
Levy collections paid to agency by HM Customs and Excise to 12 December 1978 approximately covering entertainments for the nine weeks ended 25 November 1978	1 425 000

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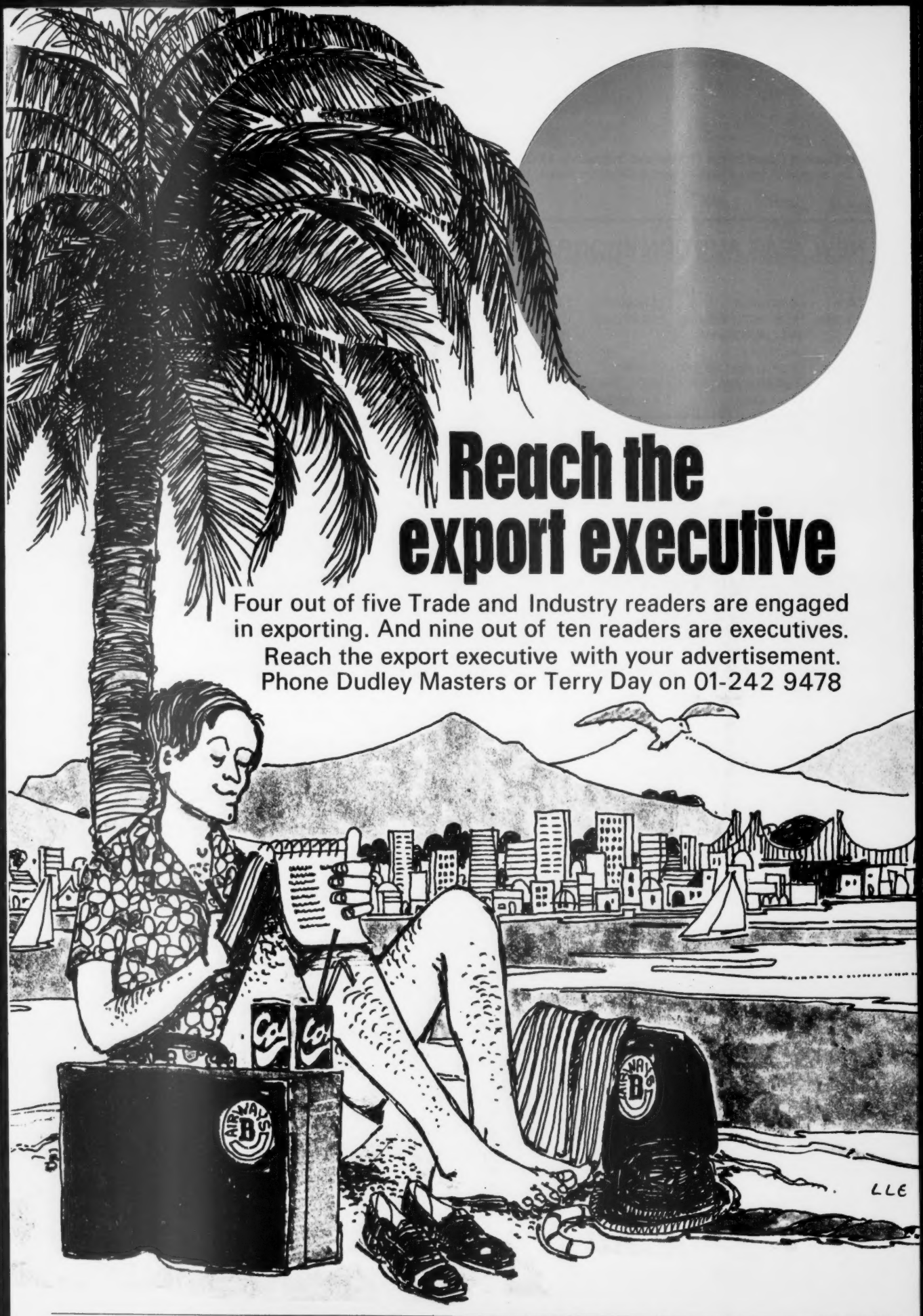
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